Mike Carson Biography

Mike Carson has over six years of experience overseeing and coordinating the financial affairs for individuals, families, and organizations. Mike works with the team at Hurlow Wealth Management Group to develop strategies that help clients build, manage, preserve, and transition their wealth.

Mike started with Hurlow Wealth Management Group in early 2008 as a part-time intern while attending the Kelley School of Business at Indiana University. He developed his fundamental wealth management knowledge during this time by working directly with John Hurlow, putting together individualized investment plans for clients. During his internship, Mike received his Series 7, Series 66 securities registrations and life/health insurance licenses. After Mike graduated, he started full time with the practice. Since then, Mike studied for and achieved the CERTIFIED FINANCIAL PLANNER ™ certification, which helps him provide comprehensive advice on all areas of clients' financial lives. He also holds the Chartered Retirement Plans Specialist™ designation through the College for Financial Planning. The knowledge he gained from this program helps Mike provide business owners with advice on implementing and managing their company's retirement plan(s).

Mike is responsible for helping clients through the Coordinated Financial Overview™ (CFO) process. This includes working with clients to create specific strategies for retirement, estate, investment, tax efficiency, and insurance planning. In addition, he works with business retirement plan clients through the Coordinated Fiduciary Overview™ (CFO) process by helping the owners and other executives manage their fiduciary responsibilities and educating employees on retirement planning.

Away from the office, Mike enjoys spending his free time with family and friends. He likes to stay active by playing and coaching basketball, golfing, working outside, and wakeboarding. Mike is a member of many professional organizations, including the Financial Planning Association, Hoosier Hills Estate Planning Council, Chamber of Commerce hYPe Program, and Wells Fargo Retirement Plan Advisor Program.