CARLTON LANE
CAPITAL

Transcripts

Why does Carlton Lane Capital exist?

Carlton Lane is designed to meet a need for an underserved group of investors. So what I mean by that is I've had a lot of investors tell me they feel like they've outgrown their financial advisor, their financial planner.

A lot of folks who get to a certain place in life, whether it's, professionally, maybe they sold a business, maybe their balance sheet is 5 or 6 times bigger than it was when they started that arrangement. They feel like they have graduated to a new level, and they're looking for things that their financial advisors may or may not be offering them.

What we've learned is that a lot of the firms that these folks work at are not equipped to offer private market solutions to their clients. Carlton Lane exists to fill that void to create an offer vetted private market solutions to people that are kind of in that in between stage.

So what is an in between stage?

They may feel like they have outgrown the advice that they've been receiving over the years,

They're not big enough to be a client of a private bank, or they're not big enough to really set up their own family office. And there's a middle ground there that's not as served as it should be.

It's underserved, and that's what we're designed to do.