

## **Robert Campbell, CFA Joins Carret Asset Management**

*Wednesday August 31, 2016 4:30pm*

NEW YORK, NY - Carret Asset Management, LLC (Carret), an investment adviser located in New York City, announced that Bob Campbell, CFA is joining the firm as a Managing Director and Portfolio Manager. Bob will be based in Kansas and will be an active member of Carret's Fixed-Income Investment Policy Committee. He will serve as a Co-Portfolio Manager for the American Independence Kansas Tax-Exempt Bond Fund, for which Carret was recently approved as sub-advisor.

"We are very proud to welcome Bob to Carret" said Neil Klein, Co-Director of Fixed-Income Strategy. "We are confident that Bob's 30+ years of experience will bolster our municipal research and portfolio management capabilities."

Prior to joining Carret, Bob worked at Arrivato Asset Management where he was responsible for the day-to-day management of the American Independence Kansas Tax-Exempt Bond Fund. Additionally, he held senior positions at American Independence Financial Services, Galliard Capital Management, First Commerce Investors, and US Bank / First Bank.

Jason Graybill, CFA, Co-Director of Fixed-Income Strategy, said, "we are both excited to be appointed the new sub-advisor for the American Independence Kansas Tax-Exempt Bond Fund and to have Bob join Carret." Graybill added, "with our rapid growth, we are adding depth to our fixed-income team".

Effective August 26<sup>th</sup>, Carret was appointed the sub-advisor to the American Independence Kansas Tax-Exempt Bond Fund, a \$200+ million mutual fund focused on investing in Kansas municipal bonds. The fund's inception date is December of 1990. RiskX Investments LLC, headquartered in New York City, is sponsor and investment advisor to the Fund. RiskX Investments offers access to a wide array of boutique asset managers and tactical strategists within a series of sub-advised mutual funds and separately managed accounts.

### ***About Carret Asset Management, LLC***

*Founded in 1963, Carret Asset Management, LLC, is an independent investment advisor headquartered in New York City. Carret manages in excess of \$2.4 billion in assets for wealth managers, financial advisors, corporate relationships, select institutions, mutual fund companies, non-profit organizations and high-net-worth individuals and families. Carret Asset Management offers three fixed income separately managed account (SMA) strategies and two mutual funds.*

*\* Investing in the Funds involves risk. For a complete list of fund risks, please see the prospectuses.*

*For more information about Carret Asset Management, LLC contact Frank Levering at 212.207.2331 or [flivering@carret.com](mailto:flivering@carret.com). Additional information is available at Carret's website [www.carret.com](http://www.carret.com).*