



## Carret Asset Management Surpasses \$3 Billion In Assets Under Management

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NEW YORK, NY - Carret Asset Management, LLC, an investment adviser located in New York City, announced that the firm's Assets Under Management (AUM) have surpassed \$3 billion. Carret has experienced consistent growth over the past decade highlighted by the expansion of the firm's fixed-income strategies. All Carret Strategies have benefited from a collaborative research focus.

"We are excited to announce that we have reached this milestone through a combination of creative and customized portfolio solutions, investment results, and superior client service. We take pride in our commitment to our client-partner relationships" said Jason Graybill, CFA, Co-Director of Fixed-Income Strategy. Jason adds that "our focus on risk-adjusted investment returns, a disciplined investment process, and research-intensive decision making has been a key driver of Carret's success. As our growth in AUM has accelerated, we remain focused on being nimble, opportunistic and client centric."

Marco Vega, Carret's Chief Operating Officer, credits the firm's teamwork based corporate culture. Mr. Vega adds that "we place great value on understanding and serving the needs of our clients. Carret continues to make the necessary investments in the firm's infrastructure and people to ensure we can meet our growth expectations, and provide our clients with the highest level of service."

Wayne Reisner, Carret's President said, "I would like to thank all of our employees for their efforts which contributed to our firm reaching this milestone. We would also like to express our appreciation to our clients for the confidence they have placed in us to manage their assets. "

Neil Klein, Co-Director of Fixed Income Strategy, said "the demand for customized fixed income solutions continues to grow as investors seek income-oriented investments, lower volatility, increased transparency, and exceptional client service."

The development of new partnerships and key relationships has also contributed to the increase in AUM. These relationships include: sub-advisory, corporate, foundation, wealth management, financial advisor, family offices and high-net-worth individuals and families.

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

*Carret Asset Management, LLC, headquartered in New York City, is an investment advisor serving wealth managers, financial advisors, corporate relationships, select institutions, non-profit organizations and high-net-worth individuals and families. Carret Asset Management offers five fixed income strategies, domestic equity, and custom balance portfolio solutions. Carret was founded in 1963.*

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