

CarsonAllaria Wealth Management offers knowledgeable, patient approach to clients

by Dan Brannan, Content Director
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GLEN CARBON - The CarsonAllaria Wealth Management business at 2246 S. State Route 157 in Glen Carbon has a personal, patient approach to the art of financial planning.

The team of Scott Carson, the managing partner, Mark Allaria, CFP®, and Joe Allaria, CFP®, MBA, bring a literal wealth of experience to the table and an approach where they take the extra time to make sure clients reach their goals.

CarsonAllaria Wealth Management, a wealth management firm dedicated to helping individuals and small businesses with all of their financial planning needs, has opened an office at 2246 S. State Route 157, Suite 225, in Glen Carbon, IL. Joe and Mark Allaria are brothers and both graduated from Edwardsville High School. Scott is a Collinsville native and has been in the Edwardsville community the past 20 years.

“We believe that every client situation should be approached from a comprehensive planning standpoint,” Carson said.

“We live here and we all love this community,” Joe Allaria said.

The company was founded by Carson, Joe Allaria, and Mark Allaria. The three began working together at their previous firm and found they had a shared vision about the direction of their business. All three are licensed to advise on securities and life insurance. Carson has been in the financial services industry for over 25 years, 15 of which were spent as the President of Meridian Financial Group in Glen Carbon. Mark and Joe Allaria were also both well-known area athletes. All the partners then went on to obtain a college education and ultimately return to enter the field of finance and wealth management.

CarsonAllaria Wealth Management is an independent, Registered Investment Advisor (RIA).

"We provide wealth management and financial planning services," the company said in a release. "We believe in a team-based approach to all that we do, and our team of advisors, acts as fiduciaries, operating with full transparency as we guide our clients in making the best financial decisions for their family, or their business."

The business definitely has a family environment with the brothers and other family members involved.

"We try to give that feel to our clients that we are not some huge firm, but a place where our clients will be No. 1. The family atmosphere helps develop the right business relationships with our clients. We are fortunate to get connected to salt-of-the-earth people who we enjoy working with."

CarsonAllaria Wealth Management has a specific philosophy on how wealth management should be done.

"We started this business so we could carry out our vision," the partners said. "We are best known for the depth of planning that we do for our clients. Many financial advisors solely focus on one or just a couple areas of financing planning. We dive into all areas of our clients' financial lives and make sure that each area is working efficiently together.

"Our team sets us apart. We not only have experienced and credentialed advisors, but we've committed to a team approach on all client relationships. We leverage each other's strengths as opposed to letting each advisor fend for himself.

"We will be the first to say that not everyone is a good fit for our firm. However, we work with clients who desire to find a partner in managing their wealth and who value the benefits of having a solid financial plan. Whether you are retired or within 10 years of retirement, or you have accumulated wealth, we can provide a high level of value by not only overseeing one area of your financial plan, but helping you with all aspects of your financial life. We have had the pleasure of working with clients from all professional backgrounds, but have gained an expertise in working with business owners and medical professionals."

One of the mottos of the wealth and financial management firm is they do what they say they are going to do, which they view as utmost importance to clients.

"We are very happy with our level of retention year to year," the partners said. "Although our advisors have only recently founded our new firm, we've worked together for three years and built our own client base prior to that. And we have been very successful in retaining our clients each year. The best part about being in this business is getting to build meaningful relationships with many different people."

Carson closed by saying: "We feel the response has been very positive to our recent move and we hope that continues."

For more information, call the business at [\(618\) 288-9505](tel:6182889505). Visit CarsonAllaria on Facebook at <https://www.facebook.com/carsonallaria/> or the website at www.carsonallaria.com.