

CALLAN CAPITAL WELCOMES ROBERT K. NEIGERT, J.D., LL.M. TAX

Robert K. Neigert joins Callan Capital as Managing Director of the Texas Region, responsible for managing client relationships and trust and estate planning.

Austin, TX (PR Web) April 9, 2018 – Austin based wealth management firm Callan Capital is pleased to announce that Robert K. Neigert, J.D., LL.M. Tax, has joined the firm as Managing Director for the TX region. Neigert is primarily responsible for client relationship management and trust and estate planning.

Trevor M. Callan, CIMA®, CPWA®, the firm's managing partner, said, "we are thrilled to welcome Robert to Callan Capital. His hire is a testament to the incredible growth we've experienced in the Austin, TX, market, and the firm's commitment to bringing world-class expertise and service to our clients."

Neigert brings 15 years of tax and wealth management experience from his previous roles, including most recently overseeing the fiduciary practice for Northern Trust's Austin, Texas, private bank office, and serving as the primary contact for Austin's high net worth complex personal trust relationships.

Neigert holds a J.D. from the University of Kansas School of Law and an LL.M. in Taxation from the University of San Diego School of Law.

About Callan Capital

Callan Capital, with offices in San Diego, CA and Austin, TX, is an integrated wealth management firm specializing in financial planning and asset management services for affluent families, executives and entrepreneurs. Callan Capital's suite of services include financial planning, asset management, executive benefit planning, retirement planning, risk management, tax minimization, estate and trust planning and philanthropic planning. Callan Capital provides clarity, direction and discipline to financial choices clients make everyday. Please visit www.callancapital.com, and read our blog at www.callancapital.com/blog.

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Callan Capital does not provide individual tax or legal advice, nor does it provide financing services. Clients should review planned financial transactions and wealth transfer strategies with their own tax and legal advisors. Callan Capital outsources to lending and financial institutions that directly provide our clients with, securities based financing, residential and commercial financing and cash management services. For more information, please refer to our most recent Form ADV Part 2A which may be found at <http://www.adviserinfo.sec.gov>. This press release is being provided for informational purposes only and is not a solicitation for advisory services or a recommendation to invest in securities.