



Our Story

Major life events, like selling a business or liquidating stock options, present a unique set of challenges that are both exciting and overwhelming. Callan Capital can help you turn your current excitement into long-term peace of mind, ensuring that your financial future is monitored, nurtured, and protected.

The Callan approach to wealth management is holistic and calculated, focusing on distinct financial planning that is backed by industry-leading research. In our recommendations, we consider what's most important to you – and tailor our services to address your priorities at every step along the way. We work closely with our clients, and their trusted advisors, to create a unified vision of success. These efforts provide our clients with future security by offering clarity, direction, and discipline to everyday financial choices.

Our Partners



Trevor Callan, CIMA®, CPWA®
Managing Partner



Tim Callan, CFP®, CPWA®
Managing Partner



Ryan Callan
Managing Partner

Our Services

- Tax Planning & Entity Structure Review
- Estate Planning
- Multigenerational Wealth Management
- Charitable Strategies
- Investment Management
- Business Succession Planning
- Cash Flow Analysis
- Asset Protection Planning
- Executive Benefits
- Education Planning
- Insurance Review & Recommendations
- Aggregated Reporting

Why Callan Capital?

Built by Entrepreneurs, For Entrepreneurs

Our advisory services are tailored to the unique requirements of executives, entrepreneurs, and high-net-worth individuals. We work with entrepreneurs experiencing a liquidity event such as an IPO, recapitalization, merger, or sale of their business. Our firm guides business owners and executives through the process of understanding their compensation packages and thinking strategically about liquidity events.

We Work for You

With our wealth management experience, we navigate the complicated aspects of wealth management for high-net-worth families like yours. Our interests are aligned, and we serve as your family's chief financial officer and fiduciary. As a fiduciary, our foremost commitment is to provide you with the utmost standard of care and to act unwaveringly in your best interests.

The Callan Capital Experience

Callan Capital provides a boutique family office experience. We work with you to create strategies that are tailored to your needs, and we draw on a variety of resources to achieve success. We meet regularly with you to continuously assess and adapt to your financial goals, and objectives.

Our Culture

At Callan Capital, our culture is the very essence of who we are and how we operate. It is uniquely defined and deeply ingrained in the collective mindset of every individual within the organization. At the heart of this culture lie our core values, which serve as guiding principles and pillars that uphold our identity, vision, and mission.



Disclaimer: 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 www.adviserinfo.sec.gov.