QuadCap WEALTH MANAGEMENT

www.quadcapwm.com



Christian Patterson, CFP®

SENIOR WEALTH ADVISOR

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Services

Investment Management

Tax Planning and Preparation

Employee Benefits

Estate Planning

Legacy Planning

Retirement Planning

Family Office

Credentials

Certified Financial Planner

Education

Southern Methodist University, Certification in Financial Planning, 2021

Southeastern Louisiana University, BA-Marketing, 2018

Overview

Christian specializes in serving corporate executives to develop personalized, comprehensive financial plans.

As a Certified Financial Planner professional, he takes a holistic approach to planning that encompasses not only financial and investment planning, but also the complex topics of tax and estate planning. He understands, and values, that no two situations are alike, and believes every family deserves a financial plan tailored to their unique circumstances.

One of Christian's favorite financial planning topics is philanthropy. He appreciates the opportunity to craft giving strategies that allow clients to maximize the impact of their support for charitable causes and organizations.

Since many of Christian's clients are extremely busy corporate executives, he understands the value of their time and aims to relieve them from the stress and burden of managing their own finances. With a "white glove service" approach, Christian takes on as much of this responsibility as possible so his clients can focus their precious time on the things that matter most to them.

Christian joined QuadCap in 2024 after six years at Exencial Wealth Advisors, where he served numerous high and ultra-high net worth families.

Christian welcomes the opportunity to help you navigate your unique financial journey.

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