HARTLAND & Co.
Investment Advisors

TEAM BIO

Carl J. Tippit, CFA || Senior Managing Director, Private Client Group

INDEPENDENCE || COMMUNITY COMMITMENTS & PERSONAL INTERESTS

Carl has been involved with the local community for thirty years, serving on the boards of environmental, educational and health-oriented institutions. Currently he is serving as Chairman of the University School Alumni Fund and is active with Fill This House, a local institution dedicated to area Foster children aging out of the Foster Care programs. Personally, Carl enjoys, tennis, skiing, flying and cycling.

EXPERTISE || CAREER ACCOMPLISHMENTS & EDUCATION

Carl has more than twenty-five years in investment management, private equity and investment research. Carl served as Senior Portfolio Manager with Sterling, the wealth advisory business of National City and as a Partner in Peppertree Partners, a Cleveland-based private equity firm. He also has owned and built several private businesses. Carl holds the Chartered Financial Analyst designation, a BA from Williams College and a MBA from the University of Chicago.

RESULTS || RESPONSIBILITIES AT HARTLAND & CO.

As a Senior Managing Director of the Private Client Group, Carl is deeply involved in bringing the institutional investment platform to Hartland's Private Clients and families. This approach integrates a high level of investment management with the specific estate, tax and financial planning needs of individuals and multi-generational families. His background in private investments, including real estate, hedge funds and private equity add to the expertise of the Hartland & Co. research team.

"What has made us successful with institutions, like in-depth planning, investment research, asset allocation and reporting, is really valuable to families. We're raising the bar in wealth management."

CONTACT CARL J. TIPPIT

To contact Carl J. Tippit, call us at 216-621-1090, or use our contact request form

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