



Financial Freedom To Live Well and Serve

Discover a disciplined, consistent framework for developing prudent investment portfolios.

[Meet our Advisors](#)



CARUSO MCLEAN & CO.

3 Principles for Long Term Investing Success

We have advised clients in Central New York for over thirty five years, with some relationships spanning more than three decades. During that time, we've measured our success quite simply: we do well when our clients achieve their long-term investment objectives.

That means we must provide timely, detailed, unbiased, customized investment advice.

Here's how...

[Find out more](#)



Individual Wealth Building

High net worth individuals turn to us because they want extra attention, a closer relationship than they can get from a larger, big city firm.

Institutional Asset Management

We are privileged to work with many talented individuals, volunteering on boards of directors to serve their communities, making lives better.

Corporate Pensions

We'll help you make sophisticated, intelligent investment decisions with a broad offering of investment options.

Insurance

Protect yourself and your family, business, and estate with life insurance, disability insurance, and long term care insurance.

[Find Out More](#) [Find Out More](#) [Find Out More](#) [Find Out More](#)

OUR INVESTMENT STRATEGY

Maximize Portfolio Return for a Given Level of Risk

Our risk management strategy centers on the principles of Modern Portfolio Theory (MPT). The goal is to maximize the portfolio's expected return for a given level of risk. We also leverage the benefits of index holdings with actively managed investments.

[Find out more](#)

Market Summary



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