



Neal D. Carlson

Founder, Managing Director

Neal graduated from the US Military Academy, West Point with a BS degree in mathematical economics, and a double major in art, philosophy, and literature. Commissioned into the US Army Corps of Engineers, Neal served for five years as a combat engineer, with a tour in Bosnia-Herzegovina. His final assignment as a captain was as a special aide and speechwriter for the general officer commanding the US Army's III Corps.

"I was honored to have the opportunity to serve," he says, "particularly at various levels, with increasing responsibilities. There are no finer people than soldiers, and to be one of them, to lead them, was such an exceptional, humbling experience."

Neal returned to Houston, where he graduated from Rice University with an MBA and expressed a keen interest in both entrepreneurship and wealth management. He joined Goldman Sachs, where he spent his first nine years building his advisory practice, tailored towards the unique needs of wealthy families. His team later joined Credit Suisse, and upon that firm's exit of their US-based private bank, he and his team transitioned with several other teams to Wells Fargo's private bank.

"Having had the opportunity to advise families on the full spectrum of their wealth management for over twelve years – from Goldman Sachs to Credit Suisse to Wells Fargo," he recalls, "I kept hearing from my clients their desire for more clarity, empathy, and independence, with minimal selling and zero conflicts. This led me to found Forthright Family Wealth – a fee-only, fiduciary firm."

As their Family CFO, Neal and his team serve their clients as fiduciaries, guiding them with clarity and purpose, unencumbered by conflicts. They help their clients build, manage, protect, and transition their wealth. They assist their clients in mitigating the existential risks to wealth that worry them. They help their clients fulfill their promises to themselves and future generations.

Neal and his wife Kristen live in the Memorial area of Houston, with their two daughters.

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