



Carlos Alvarado

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Carlos Alvarado

“I enjoy analyzing global, national, and local news, events and research reports in order to keep my clients informed of developments that might affect their portfolios. Being able to serve my clients’ needs is of utmost importance to me.”

- Investment Advisor with Herbert J Sims Capital Management, an affiliate of Herbert J Sims. (Series 66 license)
- Financial Professional holding Series 7, 63 and 65

Carlos has 31 years of experience in the financial industry and specializes in fixed income, stocks and options. He earned a BBA in accounting from the University of Puerto Rico and an MBA in international business at the University of Dallas. Formerly, Carlos was employed with Merrill Lynch as a Financial Advisor in November 1984, moving to Santander Securities in March 2000. At that time, Carlos was managing more than \$115 million in clients’ assets.

When selecting investments for clients, Carlos conducts research and takes into account each of his client’s financial goals and needs; risk tolerance and expected returns; time horizon; and understanding of the securities markets.