

Carleton Partners Investments acknowledge Cryptocurrency wave as more clients express interest



United Kingdom, London, Sep 1, 2021 ([Issuewire.com](https://www.issuewire.com)) - When the market was crashing in March 2020, certified financial planning firm Carleton Partners Investments decided it was time to introduce cryptocurrencies to their clients. A recent survey from the Financial Planning Association and the Journal of Financial Planning shows that CPI's strategy could be part of a growing trend. As investors become more interested in cryptocurrencies, financial advisors are feeling a new urgency to offer investments to clients.

Advisors that don't adapt could be left behind.

Clients are coming to advisors now knowing more than the advisors. The advisors are absolutely terrified because you never want to look dumb in front of your client. While at the moment most advisors still aren't familiar with cryptocurrencies, new certifications could emerge and broker-dealers adopt technologies to handle these assets.

How advisors are using crypto

Advisors who are integrating cryptocurrencies now are typically adding a 1% to 2% allocation but those who are more committed to the strategy may be as high as 3% to 5%. As these new investments emerge, the pressure is still on for advisors to incorporate traditional financial planning into conversations around crypto. That means finding out how much clients own and how it measures up against their risk tolerance.

How we are adapting

Carleton Partners Investments recently started a cryptoasset integration platform to help registered investment advisors integrate bitcoin, ethereum and other investments into portfolios. The company is trying to provide the resources they wish they had when starting the cryptocurrency journey in 2017. Now, the challenge for the company is to meet the demand it's seeing. More than 300 advisors signed up in the first couple of days of its May 25 2020 announcement.

We offer a high quality, personalized investment management service that aims to meet the individual demands of today's private and professional investors.

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