



Carter Family Office

Preserving value. Advancing legacy.

What We Don't Do

V1.0

Opening Word

Carter & Co. was established first and foremost to protect and grow our own capital, strategies, and values. Everything we do stems from that foundation — whether we're investing directly, building structured pathways, or opening doors for partners who align with our approach.

We don't just offer insight or connections — we walk the walk. We deploy capital, test strategy, and refine execution through lived experience. That's why we understand what works in the real world — and what doesn't. Our aim is not to be everything to everyone, but to help the right people leverage success into meaningful, sustainable results.

This document outlines what we don't do. Not to be rigid, but to offer clarity.

For a broader picture of how we operate, we invite you to explore materials like *Who We Are & What We Do* and our website which showcases more about our focus areas.

Visit <https://www.thecarterfamilyoffice.com> for more information and to see how we can help.

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- **We are not lenders.** We don't offer unsecured capital, personal loans, or conventional finance. Our capital is allocated with purpose — to opportunities that align with our strategy, structure, and risk appetite.
 - **We don't operate on request.** We aren't a fallback option for last-minute needs or a solution for gaps. We work best with foresight, not firefighting.



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- **We don't engage on ideas alone.** If a concept lacks substance, infrastructure, or delivery — it's not for us. We seek grounded opportunities, not just grand visions.
- **We don't pursue JV or equity deals by default.** While we may explore co-ownership in rare cases, our focus is typically on control, clarity, and performance — not diluted partnerships.
- **We don't entertain vague or speculative outreach.** Our time is for those who know what they want, and are prepared to engage seriously from the first interaction.
- **We don't chase fit.** If our approach doesn't resonate, that's a sign. We're not here to persuade — we're here to align.

Closing Word

Our world is built on results — and results come from structure, discipline, and aligned action. Carter & Co. supports partners not with empty promises, but with real-world outcomes that adapt, grow, and work. If you recognise yourself in this ethos, there's a good chance we'll do something valuable together.

Carter Family Office
Preserve. Grow. Deliver.

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