BARRETT CAPITAL
MANAGEMENT, LLC

Invest with intelligence.

A disciplined process for serious wealth.

Barrett Capital is an independent, fee-only fiduciary, which means our advice is built around your interests. We help individuals, families, and institutions make better decisions about investing, retirement, taxes, and wealth preservation, supported by our disciplined Global AI® investment process.

25+ years
Serving clients in multiple states for more than 25 years

Fee-only
Our fee is our only compensation. No commissions, no product sales.

CPA & CFP®
Credentialed professionals on our team

Global AI®
Our proprietary, systematic investment process

Who we help

Approaching or enjoying retirement. Turn "Can I retire?" into a plan for income, taxes, and investments that supports the life you want.

Families with significant wealth. One coordinated picture across accounts, advisors, and generations, aligned with your intentions for family and philanthropy.

Business owners and executives. Prepare for a sale or succession, coordinate concentrated positions, and turn a liquidity event into lasting security.

Navigating a transition. After the loss of a spouse, a divorce, or an inheritance: clear explanations, at your pace, for decisions that shouldn't be rushed.

Foundations and institutions. A disciplined, systematic investment approach for long-horizon objectives.

What we do

Investment management. Globally diversified, liquid, risk-managed portfolios guided by Global AI® and customized to your objectives and tolerance for risk.

Financial planning. A structured process: a guided intake, a five-module core plan, a progress scorecard, and recurring reviews.

Retirement planning. Spending, income sources, withdrawal sequencing, and investment risk brought into one coordinated plan.

Tax planning coordination. Forward-looking tax decisions made during the year, in coordination with your CPA.

Estate & legacy coordination. Connecting your financial plan with your intentions for family and philanthropy.

Global AI® asks the same questions in every market.

What are fundamental and macroeconomic data indicating?

How have risks changed across developed and emerging markets?

Does current positioning still fit each client's objectives and tolerance for risk?

Experienced investment professionals develop and oversee the process. Investing involves risk, including loss of principal.

What happens when you reach out.

1

An introductory conversation

We ask about your goals, your concerns, and your current situation. You ask us anything, including how we're paid.

2

A complete picture

If it makes sense to continue, we gather your full financial picture through our planning platform, so recommendations rest on facts.

3

Your recommendations and fee, before you decide

You review the proposed plan, investment approach, services, and fee before committing to anything. No obligation at any step.

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