

CARL BANG, MBA, CFA

WorkOptional

Carl Bang grew up in Norway. Went to college in Canada. Practiced his MBA and CFA trade as far as France and Qatar. Now, he joins the team at Plymouth's WorkOptional as Chief Investment Officer, lending his global view and considerable passion for individual goal setting to help clients best manage their money.

"It's a complex field," he explains. "There are so many different factors that can impact an investment: social, political, economic, tax, monetary policy. Returns and risks are dynamic, but a good investment is about knowledge and diligence to get to the heart of the matter. It's about looking at complexity, seeing patterns and making decisions that make sense in a complicated world."

Plus, Bang notes, change is happening at an accelerated pace — but his wide-ranging experience comes in handy there, too. "Having a global perspective often gives insight into other opportunities," he says, such as investing in markets that other local investors aren't aware of or don't fully understand or even pursuing alternative investments, such as rare cars or private markets, that help reduce the overall risk of an investment strategy.

Bang has long assisted large companies with managing wealth, but now he brings that experience to bear with individual clients. What remains constant is his belief in planning around financial goals.

"You have to be consistent with a family's changing needs and ensure investments mirror those needs as they change," he explains. "Underlying that is my strong belief in risk management; it makes the difference between mediocre and excellent performance."

"I've always defined my success in terms of how I develop talent and the success of the people working for me," Bang continues. "I use the same framework in terms of how I bring value to clients: If they are successful, I am successful. I look forward to contributing to the strong team effort at WorkOptional and bringing value to our clients in reaching their life and financial goals." 🍷

