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is the President of Pacific Advisory Group, a consulting and financial services practice specializing in the development of business succession and exit strategies for owners of private businesses. For over 36 years, Mr. Carlson has advised business owners from a variety of industries, integrating experience in estate planning, retirement planning, and executive retention programs.

Mr. Carlson received his B.A. in economics from the University of San Francisco and his J.D. from Golden Gate University Law School. He also holds a professional designation as a Chartered Life Underwriter. He is a member of the California Bar, the Association of Advanced Life Underwriters (AALU), and the Marin Estate Planning Council. He currently serves as a member of the Golden Gate University Board of Trustees.