SIGNATUREFD

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My Net Worthwhile® is committing world-class resources to help clients do more with their wealth.

Chuck leverages his 30+ years of experience in economic strategy and portfolio design to help high-net-worth families have more time to focus on what matters most.

Chuck has advised some of the largest organizations in the financial industry, serving on several elite advisory boards and councils. He is an inaugural member of the J.P. Morgan RIA Advisory Council, the Blackrock RIA Advisory Council, the Vanguard RIA Beta Group, and a member of the PIMCO Private Client Advisory Board. Additionally, he was one of the twelve founders of the Financial Planners Advisory Council for the Financial Planning Association (FPA), and the founding Chair for FPA of Georgia. Chuck has also served as an instructor at Emory University's Evening at Emory program, teaching investment classes. He has also been featured in the Journal of Financial Planning.

While still a college student, Chuck began his professional career at the investment bank of Lehman Brothers. After graduation, he entered the Merrill Lynch Training program in Princeton, NJ, and managed money in the Private Client Group. He also spent about 20 years as principal of PPA Advisory Services, where he was the firm's chief investment officer.

Chuck is a graduate of the Financial Planner Program at the University of Georgia, Terry College of Business, and holds a Bachelor of Business Administration in Finance from Georgia State University.

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