LEADERSHIP PROFILE

CHARLES R. CARTER, CFP®, CEPA

MANAGING DIRECTOR

"I find great joy listening to successful entrepreneurs' unique journey and discovering their higher-purpose goals which lie ahead. Thoughtfully delivering clarity and peace of mind for clients to pursue these aspirations is my ultimate passion."

Charles Carter is a Managing Director at Oxford Financial Group, Ltd. He is a member of Oxford's Wealth Planning Council and directs firm resources to deliver a personalized and dedicated family office experience to enhance clients' wealth. Charles is committed to superior client service and the execution of a thoughtfully crafted family wealth MasterPlan, which together enable clients to focus more of their time and attention toward pursuing their passions.

Charles often works with business owners and founders and is a passionate thought leader for the critical wealth planning opportunities preceding closely-held business transactions or public offerings. He works collaboratively with preeminent investment bankers, attorneys, tax and insurance advisors utilizing statute-protected measures to proactively safe-guard wealth.

Charles' work with clients focuses on aligning family capital with their uniquely defined family, community and philanthropic goals. Offering a true family office experience, Charles also enjoys working closely with multi-generational family members to promote the stewardship of his clients' family legacies and values.

Charles brings to Oxford nearly 20 years of experience serving individuals and families with broad financial planning expertise. Prior to joining the firm, Charles served as a Vice President at Highland Capital Brokerage and built a practice providing independent wealth planning counsel to top investment, legal and insurance professionals throughout the Midwest to support their client relationships. He is a graduate of the University of Kentucky Gatton College of Business and Economics, a CERTIFIED FINANCIAL PLANNER™ professional, a Certified Exit Planning Advisor and a member of the National Association of Personal Financial Advisors.

Though originally from Ohio, Charles and his wife live in Indianapolis with their two young daughters. In his free time, Charles is an avid golfer and enjoys playing tennis.