# LEADERSHIP PROFILE

As a Managing Director at Oxford Financial Group, Ltd., Charles demonstrates his expertise and thought leadership in delivering personalized family office experiences to clients and their families. Charles focuses on helping wealth creators and inheritors navigate the personal and financial challenges that accompany family wealth, often involving business transactions and succession/exit planning. In a world where the meaning of a "family office" is increasingly blurred, Charles is adept at discussing the financial advice landscape and helping families evaluate an appropriate wealth management structure, which operates in the families' best interest while being both well-resourced and economically savvy.

In his ongoing work with clients, Charles helps implement Bespoke Generational Solutions and private investment solutions to better align a family's capital with their unique family, community and philanthropic goals. Offering a true family office experience, Charles believes in working closely with multi-generational families across generations to promote the stewardship of family legacies and values.

## CHARLES R. CARTER, CFP®, CEPA
### MANAGING DIRECTOR

*"I find great joy in understanding an entrepreneurs' unique journey and discovering their personal, financial and business goals. Thoughtfully delivering clarity and peace of mind for clients to pursue these aspirations is my driving passion."*

As a CERTIFIED FINANCIAL PLANNER™ professional, a Certified Exit Planning Advisor and a member of the National Association of Personal Financial Advisors, Charles brings to Oxford more than 20 years of experience serving individuals and families with broad wealth 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 working alongside esteemed investment, legal, accounting and insurance professionals throughout the Midwest.

Originally from Ohio, Charles and his wife now live in Indianapolis with their three young daughters. In his free time, Charles enjoys traveling with his family and is an avid golfer.