

Professional Biography



Charles A. Kerwood, III, CFP®, ChFC – President

Charlie Kerwood, principal, serves as President of Waller Financial. Charlie oversees all aspects of the firm including operations, management, and client service. Charlie also serves as a Senior Financial Planner, providing financial oversight and guidance for several of the firm's clients. Charlie first joined Waller Financial in 1990 as a Financial Services Intern.

Charlie is also active in the community, serving as a member of the Tri-Village Lions Club, York Lodge #563, and the Ohio State University Alumni Association. Charlie graduated from The Ohio State University, receiving Bachelor of Science degrees in Business Administration with majors in International Business, Economics, and Finance.



941 Chatham Lane, Suite 212
Columbus, OH 43221
(614) 457-7026
(800) 676-7026
Fax: (614) 457-0911
Email: ckewood@waller.com
www.waller.com

Securities offered through LPL Financial, Member
FINRA/SIPC. Investment Advice offered through Waller
Financial Planning Group, Inc., a registered investment
advisor and separate entity from LPL Financial.