

Charles A. Kerwood III, CFP[®], ChFC[®], AEP[®]

Partner



Charlie has been with Waller Financial since 1990. Since joining the firm, Charlie has served in various roles from intern to his current role as partner/shareholder.

In 2009, Charlie moved to Florida to take over the firm's office in Naples. Charlie has served in numerous leadership roles in professional organizations and is involved in several non-profit organizations. His primary responsibilities are focused on client service and development for the Southwest Florida region.

Charlie is originally from Nashport, Ohio and attended Tri-Valley High School. Prior to attending The Ohio State University for his undergraduate degrees, he was active in the Ohio Army National Guard. Charlie's hobbies include cooking, reading, traveling and playing golf. He is one of three siblings, and the proud uncle of four nieces and one nephew. Charlie and his furry child, Cleo (short for Cleopatra), currently reside in Naples, Florida.

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Education & Designations

- The Ohio State University
- Bachelor of Science in Business Administration
- Majors in Finance, Economics, International Business
- CERTIFIED FINANCIAL PLANNER[™] Professional
- Chartered Financial Consultant[®]
- Accredited Estate Planner[®]



Professional Memberships

- Estate Planning Council of Naples, *Past President*
- Greater Naples Area Planned Giving Council, *Past President*
- Financial Planning Association of Central Ohio, *Past President*
- Financial Planning Association of Southwest Florida, *Past President*



Community Connections

- Ohio State Alumni Club of Naples, *President*
- Champions for Learning Professional Advisory Council
- Community Foundation of Collier County Professional Advisory Council
- Conservancy of Southwest Florida Planned Giving Committee
- Association of Fundraising Professionals, *Treasurer*

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