Charles R. Green
& Associates, Inc.

Personal and Business Financial Planners

Plan. Build. Protect.

1612 Summit Ave, Ste. 350
Fort Worth, TX 76102

(817) 348-8700
Invest@CharlesRGreen.com
CharlesRGreen.com

Who We Serve

Individuals & Families

We guide individuals and families on strategies for saving and investing, financial planning, tax planning, and risk management.

From mortgage payments and retirement, to higher education and estate planning, our team helps you manage your money and optimize your wealth for generations to come.

Entrepreneurs

We offer comprehensive plans for your business investments, retirement, executive compensation, and risk management, ultimately building your legacy.

Only 30% of small businesses survive to the next generation, with a mere 12% surviving to the third generation. Working with Charles R. Green and Associates, Inc. we can help you beat the odds.

Executives & Business Leaders

We're here to meet the needs of high earners and serve business executives and leaders in the aerospace, defense, security, medical, and advanced technology sectors.

We are proud to work with individuals from companies such as Textron, Lockheed Martin, Texas Health Resources, and Texas Instruments.

How It Works

Our approach is built on the standard of always putting our clients first and designed to help them achieve lasting financial success.

Our process is simple: ***Plan, Build, and Protect.***

Plan Your Future

When it comes to planning your financial future, ***it's personal.***

That's why our comprehensive, holistic approach is expertly tailored to each client's unique needs, investment objectives and goals.

We take the time to get to know our clients personally. We want a deeper understanding of each client's financial picture to ensure an individualized process focused on wealth and life goals.

Build Your Strategy

With a customized plan in place, it's time for our team to build ***your*** financial strategy.

Charles R. Green and Associates, Inc. works closely with our investment management professionals globally and utilize eMoney for planning implementation needs.

We provide the highest quality in both financial planning and investment guidance at every step.

Protect Your Plan

We ***never*** let our guard down.

Our team continuously monitors and constantly takes proactive measures to protect our clients' hard-earned assets and investments.

We conduct regular reviews of each client's financial plans to ensure alignment with current circumstances and goals. From routine meetings to individualized updates, our door is always open, and we are always just a phone call away.

Our Services

Our approach and services are designed to simplify your planning and optimize your wealth.

- » Retirement Planning
- » Tax Strategy
- » Investment Expertise
- » Estate Planning
- » Risk Management
- » Education Planning
- » Personal Financial Planning
- » Monthly Market Newsletter & Workshops
- » Succession Planning

Fiduciary Duty

Fiduciary duty is the requirement that certain professionals work in the best financial interest of their clients. As a Fiduciary, we must prioritize our clients' interests over our own. Fiduciaries have two key duties: **duty of care and duty of loyalty.**

Duty of Care

Fiduciaries must make informed business decisions after reviewing all available information. We analyze comprehensive information about your financial picture before making recommendations or plans.

Duty of Loyalty

Fiduciaries must not have any undisclosed economic or personal conflicts of interest.

We are a wealth management firm focused on ***personalized strategy, trust, and transparency.***

Why Choose Us

Our business is designed from the ground up to ensure each client gets the expertise and comprehensive service they deserve. And because our clients' needs are constantly changing, we continually seek new and better ways to serve them.

Our clients are family, and we know each one by name. We're fortunate to have been a trusted partner for some clients now for more than 30 years and counting.

Our Leadership Team

Charles R. Green

As an independent financial advisor, Charles has been in the financial planning field for over 40 years and has developed a successful practice through careful attention to each client's individual concerns. Charles is a member of the Academy of Preferred Financial Advisors, an exclusive Coaching Program for Top advisors around the country, and is an Investment Adviser Representative through Osaic Wealth, Inc.

A Fort Worth native, Charles is grateful to count employees from Textron, Lockheed Martin, Raytheon Technologies, Texas Health Resources, Baylor Scott & White, Texas Instruments and many other local companies as clients. He received his Bachelor's Degree in Business Administration from Lamar University. He and his wife Lauren are active in the North Texas community including Women's Auxiliary, Salvation Army, and are members of Cresson Church.

Deana Butler

Deana Butler has been with Charles R. Green & Associates, Inc. for over 25 years. She supervises, administers and manages the firm's day-to-day activities to provide our clients with the best customer care experience. As a Registered Assistant with Osaic Wealth, Inc. she is responsible for establishing and servicing accounts and oversees the implementation of any action items to assure timely and complete follow-through.

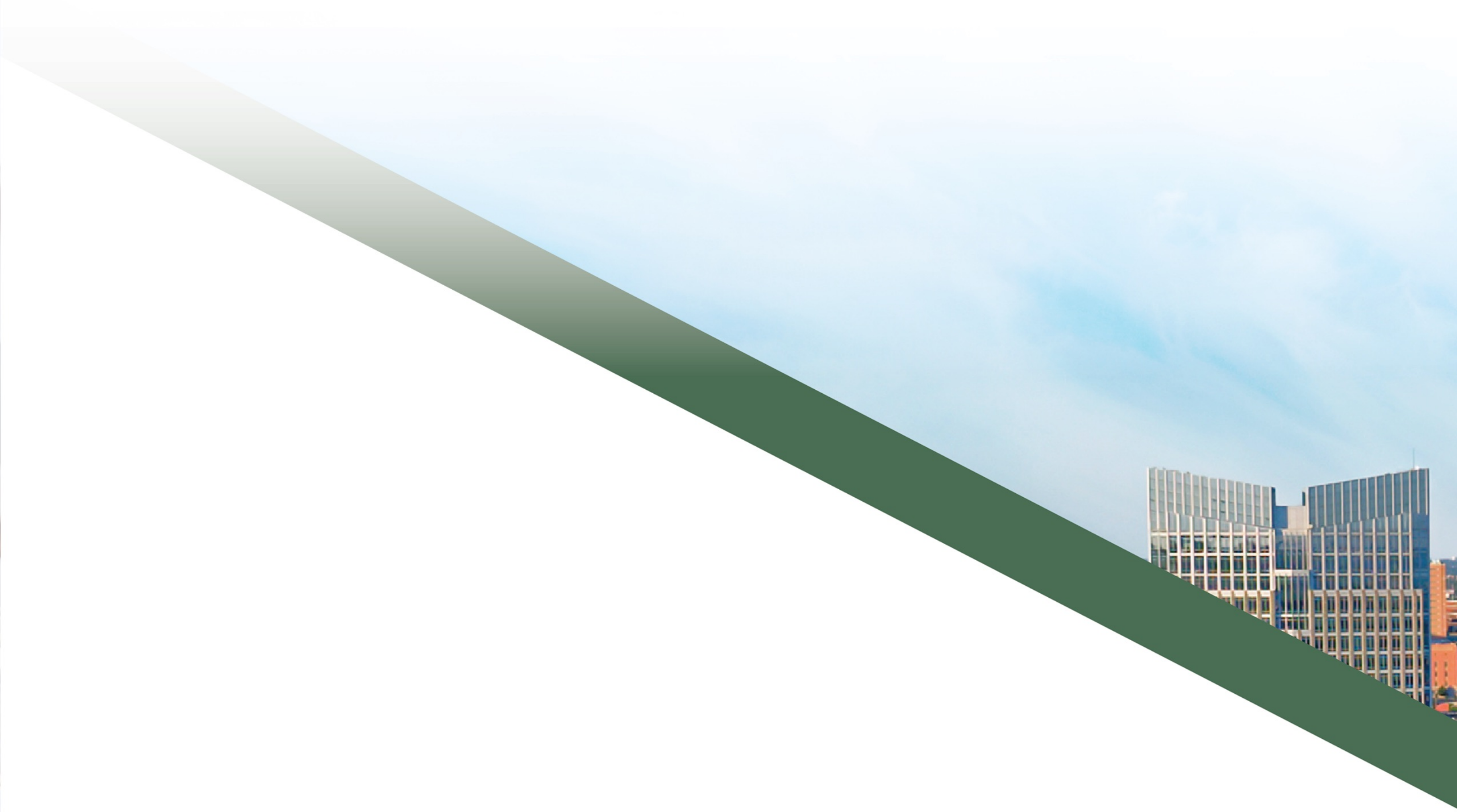
Deana graduated Brantley-Draughon Business College in Fort Worth and maintains her FINRA series 6, 63, and 65 securities registrations through Osaic Wealth, Inc. If you ask Deana what the best part of her job is, she will tell you it is the relationships with our clients. Deana enjoys spending time with her family and is especially fond of spoiling her three nieces and two nephews.

Todd C. Williams, CFP®

Todd has worked in the Financial Services industry since 2008. For the past six years, he has worked for Charles R. Green & Associates, Inc. assisting with portfolio management, investment research, review meetings and delivery of new client financial plans. Todd aims to alleviate financial stress, cultivate financial confidence, and help clients achieve their dreams and aspirations.

Todd Williams graduated in 2007 from Texas A&M University with a Bachelor of Business Administration in Finance. He completed the Rice University CFP® Certification Education Program in 2012 and earned his CERTIFIED FINANCIAL PLANNER™ designation in 2015.

Todd is actively involved in the Fort Worth Stock Show & Rodeo, a member of the Fort Worth Stock Show Syndicate, and selected by the Fort Worth Business Press for the 2021 40 Under 40 Club. He and his wife Brittney reside in Fort Worth, Texas.



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