Biography of Charles Burch Jr., CPA/PFS™, CFP® (Chuck)

Charles Burch Jr. (most well known as Chuck) is a Certified Public Accountant (CPA), a Certified Financial Planner (CFP®) and has earned the designation as a Personal Financial Specialist (PFS™). After a career in Corporate America, he now serves as a trusted Advisor for a broad range of clientele. He has over 25 years of diversified financial experience with Businesses of all sizes. His client base ranges from Individuals, Couples and Families, to Sole Proprietors and Corporations. He specializes in Guidance to growing enterprises and individuals considering business ventures. He has multinational CPA firm exposure and extensive hands-on Management experience within numerous Fortune 500 companies. He has taken best practices in large organizations and implemented them in varied business environments.

Chuck serves as a consultant in Planning for Businesses, Business Owners and Individuals considering business ventures. He specializes in Income Tax Planning, Strategic Planning and Personal Strategy Development.

Chuck is an entrepreneur that teaches others how to be successful in business <u>and</u> in their personal business. His practice is based in Dallas Texas and his client base stretches through Texas and throughout the country.

Chuck is an active member of the National Association of Black Accountants (NABA), a member of the American Institute of Certified Public Accountants (AICPA) and the North Carolina A&T Alumni Association (where he serves on the Board of Directors). He is licensed by The Texas State Board of Public Accountancy and the Certified Financial Planner Board of Standards.

Chuck is a graduate of North Carolina A&T State University where he majored in accounting. He is a husband and father of two children. He has served as an Officer on numerous Boards and organizations. Chuck also serves as Executive Director of a Scholarship fund that provides financial assistance to high school students going to college. He is a consultant, lecturer, convention and banquet speaker, workshop leader, and subject matter authority on emerging business development, personal development, tax, and strategy initiatives.

Chuck's mission is to 1) Exceed client expectations; 2) Help clients make SMART money decisions through coaching, training, and consulting; and 3) Deliver solutions that allow them to have the right number of resources, in the right places, at the right time.

CPA PFS℠
Personal Financial Specialist