

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

Partner



Charlie has been with Waller Financial since 1990. He has served various roles within the firm over the years. His primary responsibilities are focused on client service and business development, predominantly in the Southwest Florida region.

Charlie is originally from Nashport, Ohio. He was active in the Ohio Army National Guard before attending The Ohio State University. He is an avid reader. Charlie loves spending his spare time entertaining and hosting friends and family. When Charlie is not entertaining, you can find him on the links. Charlie and his cat Cleo reside in Bonita Springs, 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, *Development Chair*
- 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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