



Charles Geraci is a Certified Public Accountant and Registered Investment Advisor. Charles has been an Investment Advisor in The Woodlands since 1988. Charles strives to solve financial challenges facing our clients and ensure their personal desires are reflected in the plan. Working closely with clients, Charles structures their personal and business finances with the aim of minimizing tax exposure, securing retirement income, managing risk effectively, and maximizing wealth transfers to future generations.

*Designations Held:*

- CPA/PFS – Certified Public Accountant / Personal Financial Planning Specialist
- Registered Investment Advisor
- Investment Advisor Representative
- ChFC: Chartered Financial Consultant
- CLU: Chartered Life Underwriter

*Education:*

University of Texas at Austin – B.B.A. in Accounting/Finance

*Professional Memberships:*

- American Institute of Certified Public Accountants
- Texas Society of Certified Public Accountants
- Houston CPA Society
- Society of Financial Service Professionals
- Houston Estate and Financial Forum
- Montgomery County Business and Estate Planning Council
- Planned Giving Council of Houston