Craig Faile, CLU®, ChFC®, CFP®, MBA
Wealth Management
704-641-0018
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For twenty-five years I've enjoyed working with families and institutions who are interested in working towards the goals of organizing, protecting, and growing their personal wealth. Some clients need help simply organizing and reviewing current investments, while others benefit from a customized financial plan. Whatever your needs, you'll find comfort in knowing that you don't have to do it all by yourself. With twenty-five years of experience, professionally trained as a CERTIFIED FINANCIAL PLANNER™, and a formal education that includes an MBA from Wake Forest Graduate School of Business, I'm strategically positioned to help clients manage the complexities involved in simplifying their investment decisions.

Professional

- Twenty-five years of experience in Wealth Management
- Yale School of Management-Investment Management Theory & Practice
- Wake Forest University-Graduate School of Business (MBA)
- University of South Carolina-School of Business with Honors
- CERTIFIED FINANCIAL PLANNER™ Practitioner/CFP®
- Chartered Financial Consultant designation/ChFC®
- Chartered Life Underwriter designation/CLU®

Personal

Craig resides in The Palisades community in Charlotte, NC with his wife Amy and three children Nicholas (15), Jonathan (13), and Elizabeth (6). Craig's involvement in the local community includes Steele Creek Athletic Association, supporting various fundraisers throughout the community, Eagle Scout merit badge counselor, and Craig and his family are members of Good Shepherd United Methodist Church where Craig serves as a Board Member.

"Helping clients save, invest, and plan."