

Professional Information

CERTIFIED FINANCIAL PLANNER™

Ken Charlton is a CERTIFIED FINANCIAL PLANNER™ Practitioner.

The Certified Financial Planner Board is a professional regulatory organization. It fosters professional standards in personal financial planning. Individuals who have met their rigorous certification requirements are certified by the Board to use the CFP® trademark.

FINANCIAL PLANNING ASSOCIATION

Ken Charlton is a member of the Financial Planning Association (FPA), a membership organization for the financial planning community.

FPA members include individuals and companies who are committed to championing the financial planning process in order to help people achieve their goals and dreams. The FPA believes that everyone needs objective advice to make smart financial decisions and that when seeking the advice of a financial planner, the planner should be a CERTIFIED FINANCIAL PLANNER™.

UNIVERSITY OF CALIFORNIA, IRVINE

Ken Charlton is a graduate of the University of California, Irvine (UCI) with a Master of Science degree in Information and Computer Science, a Bachelor of Science degree in Social Sciences and Certification in Personal Financial Planning.

In 2000, Ken received a Distinguished Alumnus award from UCI.

Currently, Ken serves on the Finance Committee of the UCI Alumni Association.

STATE OF CALIFORNIA

Ken Charlton is a Registered Investment Adviser with the State of California.

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