

Curriculum Vitae - Charles L. Stanley


Charles L. Stanley CFP® ChFC® AIF®

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Charles Stanley is a Wealth Manager and Partner of WorthPointe, LLC a SEC registered Investment Advisor where he provides investment advice and other Wealth Management services to families and individuals, many of whom hold their estates in trust. He is also an author and provides continuing education to attorneys, CPAs and CFP® professionals. Mr. Stanley has been a student of the California Uniform Prudent Investor Act (UPIA) since its enactment in 1996. He has developed and provided a UPIA compliance service for trustees. In addition to his continuing education course, "The Safe Harbor for Prudent Fiduciary Investing," he has written various articles dealing with trustee responsibilities as it relates to the investment management process.

INDUSTRY QUALIFICATIONS, DESIGNATIONS AND CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™ practitioner #059575. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and  in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Chartered Financial Consultant (ChFC®) #267809. The Chartered Financial Consultant designation is awarded to candidates who meet the educational, experience, ethics and continuing education requirements established by the American College.

Accredited Investment Fiduciary®. Charles L. Stanley has earned the Accredited Investment Fiduciary® (or AIF®) professional designation from Fiduciary360. He has received formal training in investment fiduciary responsibility. The Center for Fiduciary Studies is affiliated with Center for Executive Education Joseph M. Katz Graduate School of Business University of Pittsburgh.

Investment Advisor Representative of WorthPointe, LLC, an SEC Registered Investment Advisor a fee-only fiduciary advisor.

Previously held NASD series 6, 7, 24, 63 and 65 licenses and California Life Insurance license with Variable Products authority before choosing to operate as an independent fee-only registered Investment Advisor.

EDUCATION

University of California Santa Barbara and Friends University Wichita, KS for lower level undergraduate work.

LIFE Pacific College, Bachelor's Degree with Honors 1978

American College Bryn Mawr, PA Chartered Financial Consultant program 1997

Thirty hours of continuing education bi-annually for maintenance of Chartered Financial Consultant designation from 1997 - 2007 (Now in Emeritus Status)

Thirty hours of continuing education bi-annually for maintenance of CFP® certification from 1998 – 2013

Sixty hours of continuing education bi-annually for maintenance of status as NAPFA-Registered Financial Advisor from 2007 – 2013

Six hours of continuing education annually for maintenance of status as Accredited Investment Fiduciary from 2007 to 2013.

INDUSTRY AFFILIATIONS

National Association of Personal Financial Advisors – 2007 – present. The National Association of Personal Financial Advisors (NAPFA) is the voluntarily fiduciary, fee-only organization of financial advisors. A NAPFA-Registered Financial Advisor is required to submit a peer-reviewed financial plan and must sign an annual fiduciary oath.

Kingdom Advisors - 2013 to present. Kingdom Advisors is a community of Christian financial professionals integrating faith and practice for Kingdom impact. Mr. Stanley has been a Qualified Kingdom Advisor™ since January 2014.

Financial Planning Association. Mr. Stanley served as a member of the Board of Directors for the San Diego Chapter 2001 & 2004.

San Diego County Bar Association affiliate member - Estate Planning, Trust & Probate Law Section and Financial Professional Liaison Section member.

Previously a member of:

National Committee on Planned Giving
National Association of Philanthropic Planners
National Association of Family Wealth Counselors
North County Estate Planning Group

PUBLICATIONS

“The Safe Harbor for Prudent Fiduciary Investing,” a continuing education course for Attorneys and CPAs and presented at the Professional Fiduciary Association of California. 2007-2008.

“Eliminating the Trustees Dilemma – The Uni-trust Solution,” co-authored with Bradford N. Dewan, JD, MBA of Miller, Monson, Peshel, Polacek and Hoshaw as a continuing education course for MCLE Legal Specialization credit, CPE for CPAs and CE Credit for CFP professionals®. 2007.

“Advisors Seeking Knowledge - A Comprehensive Guide to Succession and Estate Planning,” a contributing author of the practical how-to guide for succession and estate planning published by LexisNexis. 2012.

“Forewarned is Forearmed: How to Make an Annuity Purchase (or not) That You Will Never Regret,” a consumer book on annuity pros and cons. 2009.

“T.A.S.K. – The Trusted Advisor’s Survival Kit,” a contributing author to the 1150 page manual for attorneys, accountants, and financial advisors published by LexisNexis. 2009.

Multiple articles published in *“Bottomline”* a publication for Chartered Accountants and other financial advisors in Canada published by LexisNexis. 2008-2009.

“Surviving the Uniform Prudent Investor Act” published in AdvisorPro by Harcourt Publishing.

EXPERT WITNESS EXPERIENCE

Performed Expert Witness and Expert Consulting services since May 1998 in cases involving the Uniform Prudent Investor Act and fiduciary practices.