

## WCMS Preferred Vendor: Parsec Financial

Parsec Financial is a fee-only wealth management firm founded by Bart Boyer in Asheville 42 years ago. His son-in-law is a vascular surgeon in Greensboro, N.C., so he personally understands the extensive and grueling path that you all have undergone to get to where you are today. Parsec takes its work with the medical community seriously and is honored to work with nearly 200 practicing and retired physicians throughout N.C. and across the country.

### Firm highlights:\*

- Fee-only, registered independent advisor (RIA)
- Act as a fiduciary, always acting in our clients' best interest
- Manage \$4.2 billion in assets for 1,950+ families and businesses
- Provide investment management, financial planning, tax planning, trust services and business retirement services
- Grown to 73 employees in six offices across North Carolina
- Proudly a family- and employee-owned firm run by a board of directors. 80% of employees are shareholders; we truly care about our business and its long-term viability!

**As a WCMS member you can enjoy 20% off your fee on the first \$1,000,000 of assets under management.**



### **Charles Thompson, CFP® , CRPC® , CTFA™ , CEBS® \*\* Senior Financial Advisor**

Charles holds a Bachelor of Science degree in Business Administration at the University of North Carolina at Chapel Hill, where he was a recipient of the prestigious Morehead-Cain scholarship. Prior to joining Parsec in 2018, he managed retirement plan administration and participant education for large corporate and non-profit clients. His career began as an investment advisor with a regional bank brokerage. An avid adventurer and world traveler, Charles settled in Asheville in 2008 and married his wonderful wife Lindsay. He spends his free time exploring the mountains of WNC with his wife and daughters or planning their next big adventure. Learn more and meet with Charles: [parsecfinancial.com/team/charles-thompson](https://parsecfinancial.com/team/charles-thompson)

\* As of Dec. 31, 2021

\*\* CFP®, CERTIFIED FINANCIAL PLANNER™ practitioner | CRPC®, Chartered Retirement Planning Counselor | CTFA™, Certified Trust and Financial Advisor designation | CEBS®, Certified Employee Benefits Specialist

**ParsecFinancial**

parsecfinancial.com

WEALTH MANAGEMENT  
TAX SERVICES  
TRUST SERVICES  
BUSINESS RETIREMENT SERVICES

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