Charles A. Putney, President

Charles A. Putney, CFP® EA

Charles (Chuck) Putney has served a select group of financial planning clients for more than 25 years. A specialist in transition planning, he has focused on providing comprehensive financial planning services while integrating financial and life management advice tailored to each client's unique objectives. As an advisor and coach for those preparing for or just entering retirement, or having been recently widowed or divorced, Chuck compassionately guides his clients through these challenging life transitions. The focus is to preserve assets while providing stable income for life, through professional risk management and sound tax planning. Putney Financial Advisors, with affiliated firm Putney Klein Associates, Inc., is a thriving financial and tax services firm with seven people on its team, all dedicated to serving clients with five star service.

Chuck graduated from the University of Washington, with a BS in Mechanical and Industrial Engineering. After college, Chuck served four years as a U.S. Air Force, leaving as a Captain. Following his Air Force career, he served in various engineering and management capacities. His desire to work and serve in his community led him to found his own firm in 1970, Putney Klein Associates, a tax preparation and planning firm serving small businesses and individuals with complex tax matters. In 1972, Chuck successfully completed the Enrolled Agent Exam, licensing him to represent clients before the Internal Revenue Service. In 1982, Chuck entered the financial planning world, becoming a CERTIFIED FINANCIAL PLANNER™ professional in 1983; he completed his educational curriculum through the College for Financial Planning in Denver, CO.

An active member of several professional organizations, both locally and statewide, Chuck has also worked with number non-profit organizations. His experience with humanitarian social objectives makes him an outstanding leader in his community. He has served as Deacon of his church and currently serves on his church's foundation board. Chuck is a past president of the Diablo Valley Lions Club, is a past president of the East Bay Chapter of Enrolled Agents and loves to play golf.

Chuck has focused both professionally and personally on serving his community and making it a better place to live. Having taught tax, financial planning and investment courses, he is well prepared to address your financial concerns and serve your needs.

Practice Areas

- Retirement Income Planning
- Transition Planning: Widowed, Divorced, Remarried, Inheritance, or Facing Large Financial Responsibility
- Estate Planning Strategies
- Professional Investment Management
- Comprehensive Financial Planning

Education/Certification

- CERTIFIED FINANCIAL PLANNER™ professional
- University of Washington BS Mechanical/Industrial Engineering
- Enrolled To Practice Before the Internal Revenue Service
- Graduate Fellow National Tax Practice Institute

Affiliations

- Member, Financial Planning Association
- Member, National Association of Enrolled Agents
- Member, Diablo Valley Estate Planning Council
- Member, International Assn of Advisors in Philanthropy
- Frequently Featured National Speaker

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