



## CHARLES CATAPANO

### Financial Advisor

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Charles is a Wealth Manager with extensive experience educating individuals and business owners in all areas of their personal finances. Charles and his co-Advisor, Jim Rice, work together to shepherd their clients through their financial lives. These areas include but are not limited to maximizing their employer provided retirement plans, individual as well as group life insurance, college planning, business succession strategies, and estate planning.

Before becoming a Wealth Manager, Charles served as a Police Officer with the NYPD. His last assignment was with the Office of the Deputy Commissioner for Management and Budget, Financial Management Division. In the Management and Budget Analysis Section Charles utilized his professional expertise and provided analysis on all expenditures and purchases the Department was considering. Retiring in 2003, Charlie continued serving the members of the Department by providing financial education seminars to assist them in preparing for a wealthy retirement.

Charles's specializes in understanding all aspects of the City of New York pension and benefits offerings, such as the NYC Deferred Compensation Plan, Union Annuity plans, and VSF DROP program as a result of his time with the City of New York. He assists clients in making the best decisions for themselves so that they can successfully reach their financial goals.

When he is not working, Charles enjoys spending time with his wife Donna. They enjoy traveling, spending time at the beach and touring the wineries on the east end of Long Island. Together they volunteer and actively support local non-profit charities. They have six children that include a CPA, an NYPD Police Officer, a software engineer, an FDNY EMT, a future nurse practitioner and a future speech pathologist.

As a recipient of the NYC Mayors Graduate Scholarship Program, Charlie obtained an MBA in Finance from St. John's University in 1999. He is FINRA licensed with a Series 7 & 66 and has Life, Health and Variable Insurance Licenses.