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Congratulations

On Being Named a 2008, 09 and 10 FIVE STAR Wealth Manager

Inventor, Author, Speaker and Educator on Wealth Management. Named by Charlotte Magazine in 2008, 09 and 10 as a Five Star Best of Wealth Managers in the Charlotte Market. For over 15 years Bob has been educating investors, business owners and professionals on the most effective, tax efficient ways to manage ones wealth. Bob specializes in retirement income maximization, asset protection, tax advantaged investments with principle protection, along with optimizing the tax advantages and wealth building opportunities from owning your own business. Bob focuses on the three key areas of liability/debt management, taxes, home mortgages and college funding. Bob is a advocate for Independent Third Party Active Portfolio Management and Commercial Real Extate investments for diversification, income & wealth building. Bob's career path is unique when compared to 99% of all other financial advisors. Bob served over 20 years as a top senior executive for two Fortune 500 companies (DuPont and Shaw Inds.) and CFO of publicly held Aldon Inds. While at Shaw, Bob received 2 United States Patents for his inventions on randomly coloring pile fabrics. In 2000, Bob co-authored his book ASSET PROTECTION AND WEALTH PRESERVATION. Bob is well respected for his commitment to charities and has raised millions of dollars for some of the countries leading foundations. Bob lives in South Charlotte. He has 3 children and 8 grandchildren.

Capital Choice Advisors

Capital Choice Advisors was founded in 1994 for the purpose of being a truly independent objective voice and educator on Wealth Management issues. We have successfully served individuals, professionals and business owners on the safest most effective ways for growing and protecting ones wealth by making financial decisions you won't later regret.

Retirement Income Planning – includes asset positioning along with the sequencing of withdrawals in order to maximize income potential and future growth.

Estate-Asset Protection Planning – includes positioning and ownership issues in order to minimize estate, income and capital gains taxes, as well as, the exposure of assets to judgements, creditors, divorce and malpractice.

Tax-Planning – includes reviewing assets, as well as, liabilities to ensure that you are not paying more taxes either unknowingly or unnecessarily.

Investment Planning – includes researching 100's of options to ensure you have the most suitable investments for your individual situation with the goal of maximum returns at the lowest possible risk to your principle.

Business Planning – includes reviewing the options available to owners and professionals in order to minimize taxes, while taking full advantage of the perks available, including the ultimate sale of business or professional practice.

Liability Management – The most economical and effective ways to handle your home mortgages, other large liabilities and college funding challenges facing most families today.