

Charlotte Business Journal Ranks Parsec Financial in 2020 “Largest Charlotte Wealth Management Firms” and “Largest Charlotte Financial Planning Firms” Lists

April 24, 2020 - Charlotte Business Journal featured Parsec Financial in both of its 2020 lists of largest Charlotte-area wealth management firms and financial planning firms.

Their list of Charlotte-area's largest wealth management firms is ranked by total assets under management (AUM) for the Charlotte-area office. Of the 32 firms listed, Parsec ranks 19th with \$721.69 million in AUM for the Charlotte office of its \$2.99 billion total firm AUM as of December 31, 2019. Parsec increased its rank from 2019 when it was ranked 20th with \$627.75 million in Charlotte-based AUM of its \$2.44 billion total firm AUM as of December 31, 2018.

Their list of Charlotte-area's largest financial planning firms is ranked by number of local CFPs. Of the 22 firms listed, Parsec ranks 13th with five local CFPs. Only 10 in the 22 listed, including Parsec, are fee-only firms.

“We prioritize financial planning for our wealth management clients so we are delighted to be recognized on both of Charlotte Business Journal's lists,” said Partner Greg James, CFP®.

“We are always pleased to be featured on these lists as it reaffirms that we are a serious player in the Charlotte market,” said Partner Michael Ziemer, CFP®.

James and Ziemer have been with Parsec and active in the Charlotte market since 2001 and 2004, respectively. They are joined by two other financial advisors Aaron Combs and Jackie Rogers, all of whom are supported by a local team of six financial planners, portfolio managers and client service specialists.

View Charlotte Business Journal's full lists:

- www.bizjournals.com/charlotte/subscriber-only/2020/04/24/charlotte-area-wealth-management-firms.html
- www.bizjournals.com/charlotte/subscriber-only/2020/04/24/charlottes-largest-financial-planning.html

About Parsec Financial:

Parsec Financial is a fee-only registered investment advisor with \$2.99 billion in assets under management as of December 31, 2019. Parsec provides investment management, financial planning, tax planning, trust services and business retirement services to more than 1,700 individuals and businesses in six offices across North Carolina.

Learn more about Parsec's Charlotte-based team: parsecfinancial.com/about-us/charlotte-financial-advisor