

Chuck Roberts (Stifel)

Chuck Roberts - Managing Director of Investments at Stifel

Chuck Roberts, with his three-decade-long illustrious career, stands as a distinguished Managing Director of Investments at Stifel. His exceptional role is further amplified by his involvement in the prestigious Chairman's Council. Since joining Stifel in 2016, Chuck has been spearheading The CR Wealth Management Group, guiding a skilled team from their strategic locations in New York City and Miami Beach.

Chuck's expertise extends to servicing a clientele of high stature, including ultra-high-net-worth individuals, family enterprises, robust business entities, and philanthropic organizations. His goal, alongside his team, is to provide an unmatched wealth management experience tailored to the unique financial needs of their clients.

Mr. Roberts and The CR Wealth Management Group operate on a foundation of three core values: absolute objectivity, refined simplicity, and deep personal engagement. Leveraging Stifel's resources, they expertly handle financial planning, retirement, education, and charitable strategies, in addition to helping clients with employee stock option plan management.

Chuck's professional journey includes significant roles at Morgan Stanley and Smith Barney, building on his initial experience at Lehman Brothers in 1990. He holds a BS in Business Management and Economics from Stony Brook University. A resident of Miami Beach, Chuck relishes family life with his wife, three children, and two dogs, Sebastian and Nola. A devoted Miami Heat fan, Chuck also enjoys traveling, with a particular fondness for Mykonos and St. Barts.

**For 2022 qualification, Stifel's Chairman's Council consisted of 359 of the firm's top-producing financial advisors from among its approximately 2,300 financial advisors across the nation.*

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EXPERIENCE

Stifel

MAR 2016 - PRESENT

Managing Director/Investments

Morgan Stanley

MAR 2005 - MAR 2016

Managing Director, Financial Advisor

EDUCATION

Stony Brook University

SEP 1986 - DEC 1989

BS