



BERNSTEIN

Charles B. Lynch, Jr.

Principal



Charles B. Lynch, Jr. is a Principal and Financial Advisor in Bernstein's Philadelphia office, where he advises high-net-worth families, professional athletes, and institutions and their respective trusts, foundations, endowments, and pension plans. Chuck has particular expertise in counseling business owners on ownership transitions, sales to strategic buyers, ESOPs, 1042s and other complex issues they face.

Prior to joining the firm in 2007, he was a senior vice president at dental manufacturer S.S. White, where he was responsible for all international sales and marketing operations, as well as strategic planning, budgeting and analyzing revenue projections. Previously, as a senior vice president at medical device firm Surgical Laser Technologies, Chuck was responsible for managing its international divisions and traveled extensively throughout the world.

He holds a BA (with honors) in Spanish and international business as well as an MBA from Clemson University, where he was voted special teams captain of its nationally ranked football team and was a member of three Atlantic Coast Conference Championship teams that competed in four bowl games. While at Clemson, Chuck was on the Dean's List and named to the Atlantic Coast Conference Academic Honor Roll. After Clemson, he played in the NFL for two years.

Capabilities

- Asset-allocation advice
- Risk management
- Tax planning
- Retirement planning
- Multigenerational wealth planning
- Investment solutions for corporate executives
- Philanthropic planning
- Planning for the sale of a business
- Single stock and stock options planning
- Pension solutions
- Foundations and endowments
- Working with professional athletes

Community

Chuck is a member of Whitemarsh Valley Country Club in Lafayette Hill, Pennsylvania. He is also a member of the alumni boards of Chestnut Hill Academy and Clemson University as well as a member of the NFL Alumni and the NFL Players Association (as a former player). Additionally, he is active with the National Italian American Foundation (NIAF), Board Secretary for the Americans of Italian Heritage Council and an Executive Board Member of the Maxwell Football Club. Chuck speaks fluent Spanish and basic Mandarin Chinese and Italian.

About Bernstein

Bernstein Private Wealth Management is an investment firm that has focused solely on research and investment management since 1967.

Our clients are individuals and families, business owners, foundations and other financial guardians.

Bernstein offers a full range of investment services in all the world's major markets, with centralized portfolio management so that all our clients benefit from our best investing ideas.

We emphasize planning, portfolio customization and tax management so our clients can meet their investment goals without undue risk or tax burden.

As a discretionary money manager, we are bound by fiduciary responsibility to our clients; our mission is to help them limit risk and reach their goals across market cycles.

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