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Charter Research and Investment Group Inc., is a Registered Investment Advisory Firm for affluent Individuals and families.

## Our Purpose

We exist to help our clients develop and implement a personal and comprehensive financial strategy that will enable them to achieve their long-term goals in an environment that encourages dialogue and promotes accessibility.

## Our Mission

Our goal as investment advisors is to understand each client's overall investment objectives and to tailor a strategy that will produce the best results within the parameters of risk and reward established with the client. These goals and parameters may range from preserving capital and providing a reliable monthly income to growing assets, managing concentrated stock positions and the tax-efficient transfer of wealth.

# Learn More About Our Investment Advisory Services

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