Finspire

Focusing on Your Tomorrow

Finspire was created in 2018 by industry veterans Charles Williams, Chris Karam and James Jaramillo to provide a rare industry combination of fiduciary services to employers alongside financial wellness, planning and asset management to employees and individual investors.

We're here for you.

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Our Services

Investment Management

With over 60 years of combined experience, Finspire's team focuses on delivering higher risk-adjusted returns in lieu of a simple benchmark.

Financial Planning and Investment Advice

Our services focus on getting you through life's expected and unexpected events on the way to retirement. We strive to help our clients achieve true fulfillment through our collaborative financial and investment planning approach.

Retirement Planning Services

Plan sponsors can leverage our firm for a suite of retirement plan services, including plan design assistance, employee benefits planning, fee analysis and benchmarking, and much more. Operating in either 3(21) or 3(38) ERISA investment advisor, our team is here to help.

sponsors, participants, and individual investors deserve a true advocate in their corner. We'll be here to answer the tough questions and provide guidance when times are most turbulent.

Mission

Strive to improve our clients' financial well-being.

Vision

Maintain a progressive business model and build a team of like-minded, investment fiduciary-oriented professionals dedicated to enhancing the client experience.

Value

Work collaboratively with clients to pursue their financial goals, allowing them to spend more time on what matters most

Most of all, we're in this together.

Our Team

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Chris Karam, CIMA® AIFA®

Chief Investment Officer

Chris is passionate about investing and understanding the impact of global events on the capital markets. He enjoys explaining complex market concepts to clients in a way that is accessible and easily understood. In his spare time, Chris authors white papers and plan sponsor guides to share thought leadership and deliver actionable insights. He firmly believes that clients achieve better outcomes when they make informed decisions about investing and follow a sound fiduciary process. Mr. Karam helps clients strive for peace of mind by creating strategic solutions within a disciplined review process.

Chris Karam is not affiliated with LPL Financial.

Chuck Williams, CFP, CRPS, C(k)P, AAMS, AIF®

Chief Executive Officer

As a 25-year industry veteran, Chuck is devoted to enhancing the financial well-being of institutional and individual clients. He is a frequent guest speaker at financial industry retirement plans and high-net worth individual clients.

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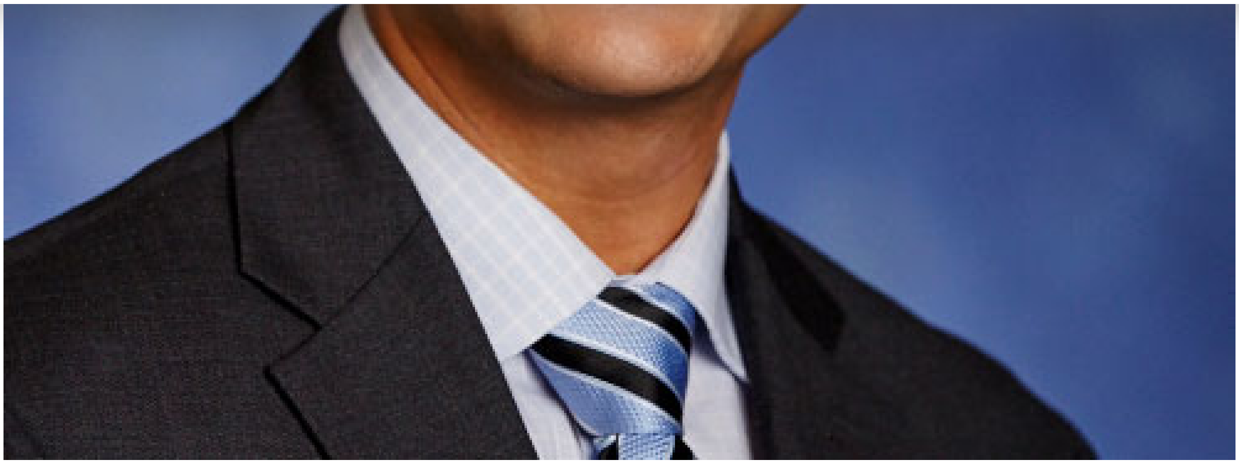

James Jaramillo, AIF®

Chief Operating Officer

James has dedicated 15 years – his entire professional life – to enhancing financial outcomes of institutional and individual clients. As a process-driven individual, he believes in providing objective, process-oriented and holistic advice to clients. James' goal in working with clients is to have each client see him as partner and an extension of the Human Resources and Benefits departments. Mr. Jaramillo is responsible for managing client and business relationships across the firm's institutional retirement business. James has a deep understanding of institutional retirement plan design, specializes in retirement plan merger and acquisition transitions and is skilled in structuring strong corporate plan governance programs.

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A Network of Support

Finspire is a member of the Independent Financial Partners (IFP) network of financial advisors.

This alliance with IFP gives our firm access to the tools and resources necessary to provide

Finspire

Independent Financial Partners Support Staff

Jakub Novak

Manager, Client Services, IFP

Mr. Novak is an employee of Independent Financial Partners and not alliliated with Finspire or LPL Financial.

Khala Watson

Associate, Client Services, IFP

Khala has over 9 years of financial industry experience. She began her career as a licensed assistant and has moved into a relationship manager role at Independent Financial Partners.

Ms. Watson is an employee of Independent Financial Partners and not alliliated with Finspire or LPL Financial.

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Alisa has been in the financial industry for over 5 years helping streamline processes to aim to improve the client experience. Ms. Knafelc fields calls from individuals contacting Finspire and helps direct them to the proper person.

Ms. Knafelc is an employee of Independent Financial Partners and not alliliated with Finspire or LPL Financial.

CEFEX® Certified

IFP shares Finspire's passion for acting in clients' best interests with the renewal of their CEFEX certification for the fourth year in a row. Our professionals are proud to be affiliated with a firm that continually strives for fiduciary excellence for plan sponsors, plan participants, and individual investors.

We'd Love To Hear From You.

Finspire

Email Address

Message

Send

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