



Charles “Chuck” H. Baldwin, MBA, CLU, ChFC

Founder & Principal: The Baldwin & Clarke Companies

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Certifications:

Series 7 & 63

Education:

MBA – Amos Tuck School at
Dartmouth College

B.S. – Northeastern
University (*with honors*)

Professional & Civic Affiliations:

Member –

Forum 400, The Association
of Advanced Life
Underwriters, The National
Association of Insurance &
Financial Advisors,
respectively

Board Member –

Current:
Crotched Mountain
Foundation

Past:

NH State Retirement
System (Chair),
Manchester CC (President)

Chuck’s passion is working with entrepreneurs and families to create, preserve and transfer wealth. Baldwin & Clarke Advisory Service’s Integrated Legacy Solution reflects his belief that a family’s legacy involves more than its assets, and that financial wealth must be transferred with accountability, responsibility and stewardship. Similarly, his conviction that risk management is the key to long-term investment success is the foundation of firm’s Integrated Wealth Solution.

After obtaining a BS (With Honors) from Northeastern University, Chuck went on to earn an MBA from The Amos Tuck School of Business at Dartmouth College. He has received CLU® and ChFC® designations from the American College. He has spent more than 40 years serving the needs of entrepreneurs and high net worth families. Chuck enjoys multi-generational relationships with many of the firm’s clients.

Chuck is a frequent speaker before international, national and regional audiences. Topics include: Estate, financial and executive benefit planning; qualified retirement plan design and fiduciary issues; business exit planning; investment risk reduction strategies and the uses of life insurance as an effective estate and business planning tool.

Active in community affairs, Chuck served as Chairman of the Board of the New Hampshire Retirement System (a gubernatorial appointment) from August of 1983 to October 1996 and has continuously served on the Board of Trustees of the Crotched Mountain Foundation (CMF) since 1981. He currently sits on CMF’s Board of Directors, and its Finance and Investment Committees. He is also a Past President of the Manchester Country Club and served as its Finance Committee Chairman for four years.

Chuck is also active in professional organizations. He is a member of the Forum 400, the Association of Advanced Life Underwriters, the Society of Financial Service Professionals, the National Association of Insurance & Financial Advisors (NAIFA) and is a former member of the Management Council of the Million Dollar Roundtable.

