

From Our President

In this increasingly impersonal world of customer service, our primary objective at The Pendergraft Group is to provide you with a staff that knows you, not just your account. Further, to provide you with the advice and resources needed to achieve your financial goals. To do this, we have a dedicated and committed staff to assist you.

Charles Pendergraft - President/Chief Investment

My start in the financial industry began a little over 25 years ago...right in the midst of Black Friday and the Stock Market Crash of 1987. Over the past two and a half decades my clients and I have weathered both good and bad market cycles...together. We have seen investment fads come and go, seen our economy rise and fall, and rise again. We have gone through everything from tech bubbles to housing collapses and virtually every conceivable market in between. I pride myself on being able to present ideas in a manner that takes much of the confusion and "broker speak" out of planning and investing, and to assist my clients from making the serial mistakes that most investors make.

By developing relationships with our clients, we are able to understand their goals, objectives and risk tolerances. And through thoughtful planning and portfolio design, we are able to develop a comprehensive investment plan to guide our clients through different market and life cycles. Through periodic reviews, we ensure that your portfolio keeps pace with your goals and objectives, and as your financial needs change, appropriate adjustments are made accordingly.

Lori Pickard - Office Manager

Lori's contribution to The Pendergraft Group is almost incalculable. In addition to being the pleasant first contact when calling our office, she also handles all account paperwork, account transfers, and virtually every other administrative task. She is fully committed to serving our clients with over a decade of experience in customer relations. Lori is very knowledgeable and is always willing to assist in any way she can.

You have my personal commitment that we will work diligently, with integrity and purpose, to make your relationship with us a courteous and professional experience.

Warm Regards,

Charles Pendergraft, II CMFC, CSNA
President/Chief Investment Strategist