

Total Wealth Planning Acquires Charles A. Liles & Associates, Inc.

Total Wealth Planning's newest acquisition increases its Assets Under Management (AUM) to just over \$1 billion of trusted client assets.

CINCINNATI, OHIO, USA, September 18, 2023 /EINPresswire.com/ -- Total Wealth Planning, an independent Fee-Only registered investment adviser based in Cincinnati, OH, announces it has acquired [Charles A. Liles & Associates](#), Inc. (CALA), based in Indianapolis, IN. The firm is a Fee-Only registered investment adviser in the State of Indiana and was founded by Charles A. Liles in 2003. The merger brings CALA's \$41M in AUM under Total Wealth Planning's fiduciary care. Total Wealth Planning currently manages \$986M in AUM as of September 2023, with an additional \$20M of unmanaged assets under its care.



Our dream team of advisors

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It feels good to share our know-how, and systems with clients of such an outstanding advisor. It is an honor to provide Charles with a succession plan to maintain a fiduciary duty for his clients.”

Robert Siegmann, MBA

The merger is part of a retirement and business succession strategy for Liles and allows Total Wealth Planning the opportunity to deepen and scale its Fee-Only wealth management and advisory services for its growing client base in Greater Indiana. Liles will stay on as a consultant over the next year to integrate the firm's processes and introduce his clients to the esteemed advisory team at Total Wealth Planning's Carmel, IN office.

As Liles states, “I was introduced to Total Wealth Planning by a colleague who previously retired and sold his practice to the firm in 2021. I was impressed by their empathetic

approach and thoughtful due diligence throughout the entire process. We share the same purpose as Fee-Only fiduciaries along with a common mission to deliver exceptional investment management and life planning experiences for clients. They are not only bringing significant

resources to my clients, but their 30 plus years of expertise as a firm will serve my clients and their families well into the future.”

[Rob Siegmann, MBA](#), principal and chief operating officer at Total Wealth Planning, states “It feels good to share our know-how, systems, and processes with clients of such an outstanding advisor. Charles has held a distinguished 30-year career in financial services and a strong sense of community volunteerism. It is an honor to provide him with a succession plan. We look forward to continuing to elevate the advisory experience and Fiduciary duty for his clients.”

Robert Lemmons, CFP®, CPA, AIF®, CEPA, principal and director of financial planning at Total Wealth Planning, states, “After comparing our financial planning platforms, it was clear that Charles and Total Wealth Planning effectively have a well-aligned approach for clients. It was a natural fit.”

David Wilder, CFP®, CTFA, MST, AIF®, CEPA, principal and chief investment officer at Total Wealth Planning, states, “We are proud to maintain the continuity of Charles’s well-laid investment plans under our investment umbrella, while continuing to leverage exceptional investment platforms such as Dimensional Fund Advisors.”

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[Total Wealth Planning, LLC](#) is an independent, Fee-Only registered investment adviser with the U.S. Securities & Exchange Commission (“SEC”) and was founded in 1989. The firm employs 7 CFP®s and 17 staff members as of September 2023. Total Wealth Planning is a member of the National Association of Personal Financial Advisors (NAPFA), the industry standard for Fee-Only, fiduciary financial advisors advocating for high professional and ethical standards.

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