

# Integrated Equity Management Promotes Charles Stewart, CFP® to Equity Owner and Partner

BLOOMINGTON, MN, UNITED STATES, May 19, 2025 /EINPresswire.com/ -- [Integrated Equity Management](#) (IEM), a boutique wealth management firm with offices in Minnesota and Florida, is pleased to announce that Charles Stewart, CFP®, has been promoted to Equity Owner and Partner.

Charles joined IEM in 2013 and has played a key role in serving clients with complex financial needs, including executive compensation planning, stock options, RSUs, SARs, and retirement strategy. Known for his analytical mindset and thoughtful approach, Charles helps clients understand how all the pieces of their financial lives can fit together into a clear and confident plan.



“Charles’s promotion to Partner reflects not only his expertise and long-standing contributions to our firm, but also the deep trust he’s built with clients over the years,” said Cammy Smith, CEO of IEM. “He exemplifies the collaborative, client-focused values that define our firm.”

Charles is a CERTIFIED FINANCIAL PLANNER® Professional and holds a bachelor’s degree in personal finance from the University of Wisconsin–Madison. He also maintains his FINRA Series 7 and 66 securities registrations through Commonwealth Financial Network®.

This milestone marks another step in IEM’s strategic growth and ongoing commitment to developing strong, values-aligned leadership to guide clients through every stage of life.

About Integrated Equity Management Integrated Equity Management (IEM) is a family-founded

wealth management firm offering personalized financial planning and investment guidance. With more than \$1 billion in assets under management, IEM partners with individuals, families, and business owners to help them make

informed financial decisions and pursue long-term goals. Learn more at [www.integratedequity.net](http://www.integratedequity.net).

Media Contact: Talia Pauletti Chief of Staff Integrated Equity Management  
talia@integratedequity.net (952) 854-5544

Talia Pauletti  
Integrated Equity Management  
+1 952-854-5544  
[email us here](#)

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