

My team's guiding principle is simply to do the right thing 100% of the time with no exceptions. We believe clients choose us because they know that we'll treat their families as if they were our own. Our greatest satisfaction is seeing our clients achieve their lifelong dreams and aspirations. Helping you pursue your goals takes more than just offering investment strategies.

We provide access to the insights of Merrill to help with facilitating family meetings, educating younger generations on good money habits, engaging in philanthropy and supporting causes that matter most to you. We also provide guidance for executives and entrepreneurs with business succession, mergers and acquisitions and capital funding.

Outside of work, I serve on eight boards, all focused on empowering vulnerable youth to reach their true potential in life. It gives me a real sense of fulfillment to share life's opportunities and I bring that same passion to my job.

I'm Champ Warren. I'm honored to serve my clients and proud to work at Merrill.

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