



Lassus Wherley
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FOR IMMEDIATE RELEASE

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Charles Pawlik Promoted to Investment Officer

New Providence, NJ (October, 2015) - Charles Pawlik has been promoted to Investment Officer. His responsibilities will expand to include monitoring economic, regulatory and market developments, managing our recommended list of investments, and conducting due diligence and performance analysis on investments held in client accounts. He will also be responsible for driving the review and rebalancing process and conducting the Investment Committee Meetings. Charles joined Lassus Wherley in 2006.

Charles received a B.A. from Pennsylvania State University. He received the CERTIFIED FINANCIAL PLANNER™ designation in 2009, and the Chartered Financial Analyst designation in 2014. Charles is a National Association of Personal Financial Advisors (NAPFA) Associate, and is a member of the Financial Planning Association, the Financial Planning Association of New Jersey, the CFA Institute and the New York Society of Security Analysts.

Lassus Wherley was founded in 1985 by Diahann W. Lassus, CFP®, CPA/PFS and Clare E. Wherley, CPA, CFP®. We have two offices to serve our clients, one in New Providence, NJ, and the other in Bonita Springs, FL. Lassus Wherley is a Fee-Only wealth management firm with expertise in financial planning, investment management, tax preparation, trust services, and family office support. We work with individuals, couples, families, pension and profit sharing plans, trusts, estates, charitable organizations, corporations and other business entities. Using a team approach that we have developed over more than 30 years, we have helped hundreds of clients build secure financial futures and achieve peace of mind. Lassus Wherley is a nationally certified Women's Business Enterprise by the Women's Business Enterprise National Council (WBENC) and a member of the National Association of Personal Financial Advisors (NAPFA), the nation's leading organization dedicated to the advancement of Fee-Only comprehensive financial planning. The Lassus Wherley web site is www.lassuswherley.com.