



CHARLES VISCONAGE, JR.

CLU | ChFC



FIRST VICE PRESIDENT
WEALTH MANAGEMENT &
INSURANCE SPECIALIST



MARYLAND

PHONE: (410) 218-7712

Charles Visconage specializes in connecting generations through wealth preservation and transfer. He has extensive experience providing sophisticated strategies for high net worth families, executives, business owners and their professional advisors in the following areas:

Wealth Preservation and Transfer – including uses of insurance funding in estate plans and charitable gifting

Business Plan Funding – including buy sell arrangements, business succession planning, and executive benefits and compensation arrangements



PROFESSIONAL HIGHLIGHTS

26 years financial services experience with specialization in estate, wealth, charitable and business insurance planning

First Vice President and Wealth Management & Insurance Specialist with Merrill Lynch since 1997

Member – Society of Financial Service Professionals

EDUCATION | DESIGNATIONS | LICENSES

Bachelor of Arts: Marketing – Southern Illinois University

Chartered Life Underwriter – American College

Chartered Financial Consultant – American College

NASD Series 6 and 7 licenses

Life, Health and Long Term Care Insurance licenses

WEALTH PRESERVATION
AND TRANSFER

ESTATE PLANNING

BUSINESS SUCCESSION

BUSINESS INSURANCE
STRATEGIES

CHARITABLE GIFTING

EXECUTIVE
COMPENSATION
PROGRAMS