

# Michael E. Fayed, MBA, CPA, AIF®, CFP®

Your Personal CFO

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## My Experience

- Over 25 years of experience in the industry
- More than \$200 million in client assets managed, serving upwards of 200 households
- CERTIFIED FINANCIAL PLANNER™ (CFP®) professional
- Certified Public Accountant (CPA)
- Accredited Investment Fiduciary® (AIF®)

## My Values

*Conversations never begin with investment options – they begin with you*

- Strive to know you, your values, needs, and goals
- Meetings to discuss your concerns and questions
- Customize our services to you wherever you are in the process

*A plan is never done – flexibility is key for matching your finances to life's surprises*

- One-on-one attention through the entire process
- Vigilant as your CFO, constantly monitoring your portfolio to help keep you on track

*Young people are our future – as a community and as an industry*

- Sponsors four scholarships annually at Winthrop University for financial planning students
- Board member of Boys and Girls Club of Greater Gaston, Gaston Community Foundation, and Heart Society of Gaston County

## My Services

- Retirement income planning
- Investment planning and management
- Tax planning
- Estate planning
- Risk management and insurance

*“As your personal CFO, I will work one-on-one to implement sound financial solutions grounded in your needs and values, putting you on track to realize your dreams.”*

**mefplanning.com**

704-266-5200



## About Mike

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Mike started in the industry as a CPA. As a financial advisor, he draws on his tax planning experience as he offers comprehensive financial planning to clients. Mike recognizes how hard his clients work to transform their dreams into reality and strives to be a trusted partner in their financial journey. He has earned a number of qualifications including an MBA degree, the CERTIFIED FINANCIAL PLANNER™ certification, Accredited Investment Fiduciary® designation, and FINRA Series 7, 24, 28, 63, and 65 licenses.

Mike is a proud alumnus of Winthrop University where he started on the basketball team all four years and met his wife, Jennifer. They have two children and reside in the Belmont area.



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