



**Chuck Adam**

MERITAGE Wealth Insurance Advisors  
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**Background & Experience**

Chuck is a founding partner of MERITAGE Wealth Insurance Advisors. He has provided life insurance and advanced planning strategies in South Texas and Louisiana for high net worth individuals and families for over 30 years. Most of the work Chuck performs is directed toward wealth transfer and wealth preservation.

He studied mechanical engineering at the University of Houston and began his career in the financial services industry in 1990 after college. Beginning at PaineWebber as a Financial Advisor in 1990, Chuck served as the life insurance specialist for Smith Barney from 1995-2013 and accepted the same position with Wells Fargo Advisors from 2013- 2019. Chuck's entire practice is focused on high net worth individuals and families.

**Certifications & Education**

- University of Houston, Houston, TX