



Charles Bridge Partners

OUR INVESTMENT APPROACH

Fort Worth, Texas · charlesbridgepartners.com

OUR PURPOSE

Help you win.

Wealth isn't money. It's time.

WHO WE ARE

Plan for decades. Steward for generations.

Charles Bridge Partners is a planning-led firm built on a simple conviction: your tax return, your financial plan, and your portfolio are one system — and they should be managed like one. We serve business owners, athletes, and families, building wealth so they can focus on what really matters.

OUR INVESTMENT FOCUS

Start with the end in mind.
Build evergreen portfolios for decades.

THE RULE OF 5

Five timeless rules guide
every portfolio we build.

The Rule of 5

The discipline behind every portfolio.

01

VALUATION

Own good assets at fair prices.

02

TAXES & FEES

It's not what you earn. It's what you keep.

03

PRECISION

Every holding has a purpose. Overlap gets removed.

04

FOCUS

*Ignore the noise.
Concentrate on what counts.*

05

CAPACITY

Never take more risk than your plan can carry.

HOW A PORTFOLIO GETS BUILT

Built around your purpose and principles.

01

DISCOVER

Purpose & Principles

We uncover the purpose behind your wealth and the principles that will guard it.



02

TAILOR

Policy

Together we write your Investment Policy Statement — the written plan that governs your money.



03

IMPLEMENT

Execution

The portfolio is built and managed inside that policy. The plan governs, not the headlines.

Kept on Course

Once portfolios are live, the cadence is simple.

Report

QUARTERLY

Plain-English reporting: what you own, what it costs, how it tracks to plan.

Rebalance

BY POLICY

When allocations drift beyond their bands — not when headlines get loud.

Revisit

ANNUALLY

Life changes. The policy keeps up. We revisit your purpose every year.

What Actually Compounds

WHAT THE INDUSTRY SELLS

Access to talent

The ability to forecast

Perfect timing

WHAT ACTUALLY COMPOUNDS

Costs kept low

Taxes managed deliberately

Steady behavior in every market

Time, protected by discipline

Next Steps



A free discovery call to look at where you are.



Share your current portfolio and last return.

OUR PROMISE

We will help you set the foundations
that bridge to generations.



Charles Bridge Partners

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