

GO  
FOCUS AHEAD  
MOVE FORWARD  
FIND YOUR WAY  
MAP EACH TURN  
SEE NEW HORIZONS  
MEASURE MILESTONES  
ELEVATE TRAJECTORY  
CHART EACH DREAM  
PLOT THE FUTURE  
RISE ABOVE RISK  
COUNT THE REAL  
FIND FREEDOM  
DO



**R-AXIS**  
FINANCIAL PLANNING+INVESTMENTS



*Aspire & achieve*  
**FINANCIAL FREEDOM.**



EVERYONE CAN BENEFIT FROM  
SOUND FINANCIAL PLANNING.

# THIS IS FOR EVERYONE

WHO WANTS TO FEEL  
EMPOWERED AND IN CHARGE.





# ABOUT R-AXIS

*Client service & professional, competent management  
are at the center of our philosophy.*

By first learning and understanding unique client goals and objectives, we design comprehensive solutions that not only meet your aspirations, but also mitigate associated risk with any financial plan that we may create.

We build long-term relationships with our clients so that as your goals change, we can confidently direct you as you make crucial decisions which will actively shape your personal and financial futures. By *always putting our clients first*, we are able to build and maintain financial plans in line with your values, as well as meet a wide range of client resources, goals, circumstances, and lifestyles.

With an abundance of information, products and opinions available to you, it can be tough to decide whom or what is most beneficial for you when organizing your finances and developing your longterm financial strategy. By working with R-axis, you are guaranteed a straightforward and competent analysis of your current situation. We offer you *real numbers, real solutions, real results*, and various platforms that will leave you feeling confident in your course on a mindful journey to financial freedom.

*“At R-axis,  
the best interest  
of the client  
will always be first.”*

// CHARLES RUSS

R-AXIS FOUNDER  
REGISTERED REPRESENTATIVE  
FINANCIAL ADVISOR

# **ABOUT** **SERVICES**

## **Retirement planning**

*Traditional & roth IRAs*

*Annuities*

## **Risk management**

*Life insurance planning*

*Long-term care & disability insurance*

*Universal & variable universal life insurance*

## **Small business group benefits**

*401ks*

*Life insurance*

## **Wealth management**

*Separately managed accounts*

*Estate conservation*

*Mutual funds*

*Unit investment trusts*

*Tax planning*

*Charitable giving*

## **Cash management**

**Tax planning**

**College funding**

*529 plans*





*When & where  
should you start  
planning your  
financial future?*



THE TIME IS  
**NOW**  
THE PLACE IS  
**RIGHT WHERE  
YOU ARE**



DO SOMETHING TODAY THAT  
**YOUR FUTURE SELF**  
**WILL THANK YOU**  
FOR (SO WILL YOUR FAMILY).





# ABOUT

## CHARLES RUSS

Charles Russ graduated in 2002 from the United States Military Academy at West Point, with a BS in Engineering Management and a Field of Study in Civil Engineering. He was commissioned a Second Lieutenant into the United States Army in 2002. He attended several Army schools, including the Air Defense Officer Basic Course, Air Assault School, Airborne School, and the Bradley Mechanized Leader's Course. He joined his first unit in Baghdad Iraq in June of 2003, where he served as a platoon leader for 12 months. He returned to Germany to serve as the Detachment Commander for Task Force Falcon, and the OIC for the deactivation of his old unit. His other assignments include Battery Executive Officer (Delta Battery, 5-7 ADA), Battalion Logistics Officer (5-7 ADA), NATO Plans Officer (EADTF), and Plans Officer (357th AMDD).

In June of 2007, Charles also completed his Masters of Management with the University of Phoenix.



After working for 11 months part-time as a Financial Advisor, Charles received an honorable discharge in June of 2009, when he began his full-time career as an Investment Advisor Representative at Interinvest International Incorporated.

In April of 2017, Charles began his own personal branch and brand at Interinvest, with R-axis Financial Planning and Investments. He is now working with clients all over the U.S., as well as with U.S. expatriates and American military personnel living abroad. He offers comprehensive financial plans that include personal savings and budget management, investments, and detailed risk management strategies.

Charles currently holds the following Financial Industry Regulatory Authority Licenses: Series 6, 63, and 65. He also holds State Health and Life Insurance Licenses from SC, NC, OH, HI, IN, GA, and VA.

Charles is a member at Israel Metropolitan CME Church, and is a Life Member of the Veterans of Foreign Wars (Post 9534) and the Association of the United States Army (AUSA). He is based out of Greenville, SC, where he grew up; he was born in Indianapolis, IN, where he visits frequently.

In his spare time Charles enjoys working out, traveling, and spending time with his identical twin sons, Brooks and Bradley.





**R - A X I S . C O M**

*Let's set up your*  
**FREE CONSULTATION.**





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> *FINRA.org*

> *SEC.gov*

> *SIPC.org*