



business sponsor spotlight

By Claire Sinozich

# AdaptFirst INVESTMENTS

Charles Freeman, president of AdaptFirst investments, founded his new firm a year ago, but has been part of the Triad community all of his life. Hailing originally from Kernersville, or as Charles calls it, “K-Vegas,” Charles graduated from UNC-Chapel Hill in 1996 and has spent most of his life in North Carolina. His first jobs were cleaning bathrooms in the Arby’s franchises owned by his father, moving up to operations manager for all eight restaurants by the time he graduated from college.

After graduation, there were a few years that Charles spent pursuing amateur fencing at the national level with the New York Athletic Club in

New York City, but quickly turned to investment management. After moving to New York in 1998, he applied at a Wall Street firm suggested to him by a friend on the fencing team. Once he started the job, Charles knew he would never do anything else — he had found his passion.

Pursuing his highly analytical nature and entrepreneurial background, Charles founded AdaptFirst Investments in 2017. His business analyzes global markets in search of investment opportunities for his clients, monitoring equity, fixed income, commodity, and currency markets daily. AdaptFirst Investments specializes in research that not only



Charles and Ella

helps clients find favorable risk and reward opportunities for their investments, but also protects assets when market conditions turn negative.

What sets Charles apart is his community-based attitude and impressive qualifications. Charles first expanded into financial planning in 2004 by helping out family members. While many investment management firms require a minimum investment, sometimes up to half a million dollars or more, Charles first worked with his extended family, whom he knew couldn’t reach those criteria. Instead, Charles decided to start his own business that would give him the freedom to implement creative solutions freely for his clients and run his business more effectively, helping out individuals and families regardless of their asset level.

AdaptFirst Investments uses Bloomberg Professional as their

primary research platform, setting them apart from other financial planning firms. Bloomberg offers unparalleled market information from across the globe, allowing AdaptFirst unique access to research to build client strategies. Charles is also a Chartered Financial Analyst (CFA), recognized as the highest designation of certification in global asset management. Fewer than one in five candidates become a CFA charterholder, and most move to larger institutions. However, Charles wanted to bring that same level of professionalism and knowledge to his own family and community here in North Carolina.

Charles doesn’t spend all his time crunching numbers, though. He has a 5-year-old daughter named Ella who loves to swim and play American Ninja Warrior. His parents still live in North Carolina, although they’ve moved to Pine Knoll Shores near Emerald Isle. Charles is an aspiring tennis player, snowboarder, and guitarist, and you may know him as the bassist in the local band Room42.

With a goal to help the community have realistic expectations and set achievable goals for their investments, Charles is a family man with a true passion for guiding people to positive financial decisions. Armed with the right information, he believes every individual can achieve their financial goals, no matter how big or how small.

