



Sandy Carlson, CFP®, CPA

Financial Advisor

Sandy Carlson joined Rinehart Wealth Management in August 2013 as a Financial Advisor. She enjoys getting to know her clients and working to provide them with creative and integrated solutions for accumulating, preserving and transferring wealth. She brings over eighteen years of wealth management experience with her that include income taxation, retirement planning, insurance, trusts and banking. As a Florida native, she is a graduate of Florida State University, receiving her Bachelor of Science in Finance.

Sandy's prior experience includes employment with the Tallahassee, Florida CPA firm, Thomas Howell Ferguson P.A., where she earned her Certified Public Accountant designation and with Synovus Trust Company in both the Personal Trust Area and the Retirement Plan Services Division, where she earned her Certified Financial Planner designation. She holds her Series 65 license and is a Registered Investment Advisor Representative. In addition, she holds the Qualified 401(K) Administrator (QKA) designation by the American Society of Pension Professionals & Actuaries.

Sandy serves on the Board of Directors of the Financial Planning Association of Charlotte, and is a member of both the North Carolina Association of CPA's, and the American Institute of Certified Public Accountants. She is a Sustainer Member of The Junior League of Charlotte and a member of St. John's Episcopal Church where she serves as the Alter Guild Chair and is a member of the Endowment Board.

scarlson@rinehartwealthmanagement.com
