Strategic solutions made personal

Elias, Charles, Sharpe Private Wealth

Driven by relationships

At **Elias, Charles, Sharpe Private Wealth,** relationships are at the core of everything we do. We work with a select group of high-net-worth individuals and families who value commitment, insight and connection. We don't just manage wealth—we lean into relationships. That means taking the time to deeply understand what matters to you: your family, your business, your goals and the opportunities and transitions ahead.

Above all, we aim to be your first call—not just for investment advice, but for the moments and decisions that define your life.

Advice that's personal, planning that's precise

Our clients build more than wealth—they build families, legacies and impact. That's why our solutions are never off the shelf or cookie cutter. We bring together strategic thinking, financial fluency and real-world perspective to support complex needs across investments, estate planning, philanthropy and more.

Each member of our team adds a different lens—but we're unified by a shared commitment to serve with empathy, precision and personal care.

Experience and insight for what matters most

True insight comes from decades of experience, and it allows us to guide our clients through complexity with clarity and focus. We walk alongside clients and their families through major life moments: business growth, liquidity events, generational change, legacy planning and more. By serving a focused group of clients over time, we've built deep relationships that allow us to recognize issues, anticipate challenges and provide guidance with perspective and care.

We help you pursue goals with confidence—while staying grounded in what matters most: your people, your priorities and your purpose.

A personal connection with global reach

With our team, you gain a relationship focused on your needs and powered by one of the world's leading global wealth managers. Whether you are navigating a complex estate plan, evaluating investments or exploring philanthropic paths, we bring the right experience to the table with intention and insight. But what sets us apart is how we show up: consistently, proactively and personally.

We stay close to what matters to you—aiming to be always a step ahead, always ready to listen, and always here when it counts.

Meet your advisors

Mark S. Elias

Private Wealth Advisor
Managing Director–Wealth Management
Senior Portfolio Manager

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Mark is a former CPA and attorney who brings deep expertise to his role as a Private Wealth Advisor. Drawing on his background and experience, he offers clients sophisticated guidance on complex financial and business matters. He begins every relationship by asking thoughtful questions and listening closely – seeking to understand not just the numbers, but the values and priorities that define each client's life. With that insight, he designs tailored investment plans that bring together lifestyle, estate planning and philanthropic aspirations in a clear, actionable strategy.

Bryan L. Charles, CEPA®

Financial Advisor
Vice President—Wealth Management

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Bryan advises ultra-high-net-worth individuals and families, providing guidance in structuring and optimizing their entire balance sheet. He works closely with entrepreneurs, executives and multigenerational families to navigate the complexities of investment management, estate planning, tax efficient planning and risk mitigation. By taking a holistic approach and integrating sophisticated financial strategies, Bryan helps clients preserve and grow their wealth while helping to ensure their long-term objectives remain the foundation of every financial decision.

B. Wynne Sharpe, CEPA®

Financial Advisor
Senior Vice President—Wealth Management

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Wynne has diverse experience providing successful families and entrepreneurs with the knowledge and advice they need to navigate their complex financial lives. Over the years, he has worked successfully with clients' entire families, providing a multigenerational approach. Wynne believes in the importance of planning with a focus on liquidity, longevity and legacy, because fully understanding his clients' situations today is critical to preparing for, preserving and building on their success into the future.

Start the conversation

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