



Kathryn M. Woodfin

Director of Wealth Services

Kathryn Woodfin is Director of Wealth Services of Charter Trust Company. She joined the firm in 1996 and is based in our Concord NH office.

Founded in 1984, Charter Trust Company is a wealth management firm headquartered in Concord NH. Working confidentially with individuals, families and institutions to increase wealth through asset allocation, investment management, and charitable giving; and preserve, protect, and transfer wealth through estate planning and business succession strategies, education and philanthropy. The company manages over a billion dollars in client assets and acts as fiduciaries for clients in 43 states and 3 countries.

As Director of Wealth Services, Ms. Woodfin oversees the wealth management services for the firm's clientele. She is one of four senior managers that manage the firm's day-to-day operations. Ms. Woodfin sits on the Trust Policy Committee and Account Review Committee. She also leads the 401(k) Group and the Town Trustee/Municipal Group. Ms. Woodfin has over 30 years' experience in the banking and wealth management industry. Ms. Woodfin is a member of the NH Estate Planning Council.

Ms. Woodfin graduated from the University of New Hampshire's Whittemore School of Business and Economics, and holds a Bachelor of Science degree in Business Administration. Ms. Woodfin is currently enrolled in the National Trust Schools, Certified Trust and Financial Advisor (CTFA) program.

Ms. Woodfin volunteers in her community including Bishop Brady High School where she previously served as Bishop Brady Alumni Association President. She received the 2015 Caritas Award in recognition of her volunteer commitment to the school.

