



Deanna Wilson, CFP®, CTFA

Senior Vice President & Wealth Manager

Deanna Wilson is a Senior Vice President and Wealth Manager at Charter Trust Company. She joined the firm in 2017 and is based in our New London, 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.

Ms. Wilson holds a Bachelor's degree in Business/International Studies from Norwich University. She is an honor's graduate of the Cannon Financial Institute Trust School and completed the Boston University Financial Planning Program.

Ms. Wilson has over 25 years of financial experience. She was with Ledyard Financial Advisors in New London, NH for 10 years and was Vice President and Senior Financial Advisor when she left to join Charter Trust. She has extensive experience in Trust and Estate Planning and offers her clients comprehensive Wealth Management and Financial Planning solutions. Prior to that she was with Dartmouth Hitchcock Medical Center and Dartmouth Medical School and worked with donors to structure philanthropic gifts through the use of planned giving.

For 15 years, she held a variety of positions with Chittenden Bank / Vermont National Bank, serving in the Trust operations and Administration areas and for many years as a Trust Officer.

Ms. Wilson is an active member of her community as a volunteer with a range of organizations. She is a Director of the Lake Sunapee Region VNA as well as the Chair of the Investment Committee and a Development Committee member. She is an active member of the New London Rotary club and past board member.

