



Frank Owen

Partner

F.R. Owen & Associates

Frank Owen is President of F.R. Owen & Associates, a retirement planning firm that specializes in working with educators in the Charlotte, NC area. In 2008, the firm merged with U.S. Retirement Partners, now known as U.S. Retirement & Benefits Partners (USRBP).

Prior to the merger, F.R. Owen & Associates operated independently from 1992 to 2008. Mr. Owen's background in retirement planning began while serving in the U.S. Air Force, specializing in military pay and counseling retiring personnel about their post-service financial and benefits options.

After his Air Force service (1971-1976) he chose to enter the financial services industry in 1978. In 1980 he joined with his late father to specialize in the educator marketplace and to broaden the focus of products and services as their client base continued to grow. After his father's death in 1989 he incorporated the practice as F.R. Owen & Associates. Throughout his career, one thing he has learned is that people need help understanding that every situation has a solution but the issue is not knowledge; it is the application of that knowledge for their personal situation. With his team focusing on the individual client he believes their personal service model is still very much needed in today's market.

Mr. Owen has a BS in Political Science from Georgis College and also holds the CLU and ChFC designations. He served on the Board of the National Tax-Sheltered Association from 2007-2009 and as President during 2 years on that board.

Mr. Owen resides in Matthews, NC with his wife.