

Punch

A BOUTIQUE INVESTMENT ADVISORY



Khalil Harris, CFP®, CRPC®

Associate Advisor, Wealth Strategies Group

Khalil joined Punch & Associates in March 2024 as an Associate Advisor. Prior to his current position, he honed his skills at two local wealth management firms by working closely with clients to understand their goals and presenting solutions to achieve them. As a member of our Wealth Strategies Group, he is excited to assist clients in all aspects of financial planning.

Khalil graduated from Clemson University with a bachelor's degree in Financial Management and a minor in Accounting. Khalil chose the financial planning as an emphasis area during college and gained early exposure to the nuances of financial advising. In the summer of 2022, he passed his Certified Financial Planner™ exam, and after completing the CFP Board's professional experience requirement, he became certified in the summer of 2023.

Khalil grew up in Illinois and North Carolina, and now lives in Chanhassen. He enjoys working out early in the morning and rooting for all the Chicago (especially the Bears) and Clemson sports teams in his free time.

Years at Punch:

1

Years in the Industry:

4

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