



Scott D. Sorrell, CLU®, ChFC®, CFP®, AIF®, RICP®, CASL®, CLTC
Advanced Planning Advisor

8816 Six Forks Road | Suite 301
Raleigh | NC 27615
Phone: 919.719.3817
Fax: 919.546.0888
ssorrell@capfs.com

www.scottsorrell.net



My clients choose to work with me because of my honesty, integrity, and passion. What this means to you is I will show a genuine interest in helping you protect, preserve and grow what you have built. The real benefit is you can have the confidence, clarity, and peace of mind to honor the agreements to your loved ones and business partners.

Professional Services

- Fee Based Advisory Services
- Financial Planning
- Estate Planning Strategies
- Life Insurance Planning
- Retirement Income Planning
- Wealth Transfer Strategies
- Estate Conversion Strategies
- Personal and Business Insurance

Professional Qualifications

- Series 6, 7, 63, 65 Licensed
- Life/Health/LTC Insurance Licensed
- (CLU®) Chartered Life Underwriter
- (ChFC®) Chartered Financial Consultant
- (CFP®) CERTIFIED FINANCIAL PLANNER™
- (AIF®) Accredited Investment Fiduciary
- (RICP®) Retirement Income Certified Professional
- (CASL®) Chartered Adviser for Senior Living
- (CLTC) Certified in Long Term Care
- Lifetime Member, Million Dollar Round Table 2006– Present
2012, 2013, 2014, 2015, 2016 Court of the Table Member
- Qualifier (ACE) Achieving Client Excellence 2006– Present
2012, 2013, 2014, 2016 Platinum Qualifier
- Member, Society of Financial Service Professionals
- Member, Financial Planning Association

Personal

- Grew up in High Point, NC
- Graduate, UNC– Chapel Hill with B.A. in Psychology
- Rotary Club of the Capital City
Paul Harris Fellow
- Member, Ram's Club UNC– Chapel Hill
- Member, GAA UNC-Chapel Hill
- Resides in Downtown Raleigh