



**Scott D. Sorrell, CLU, ChFC, CASL, CLTC**  
***Investment Advisor Representative***

8816 Six Forks Road | Suite 301  
Raleigh | NC 27615  
Phone: 919.719.3817  
Fax: 919.325.4517  
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 will have the confidence, clarity, and peace of mind to honor the agreements to your loved ones and business partners.**

**Professional Services**

- Investments
- Financial Needs Analysis
- College Funding
- Products and Services for Retirement Planning
- Managed Accounts
- Estate Conservation Strategies
- Personal and Business Insurance
- Life Insurance
- Long Term Care Insurance

**Professional Qualifications**

- Series 6, 63, 65 Licensed
- Life/Health/LTC Licensed
- (CLU) Chartered Life Underwriter
- (ChFC) Chartered Financial Consultant
- (CASL) Chartered Adviser for Senior Living
- (CLTC) Certified in Long Term Care
- Member, Million Dollar Round Table 2006– Present
- Qualifier (ACE) Achieving Client Excellence 2006– Present
- Member, National Association of Insurance and Financial Advisers (NAIFA)

**Personal**

- Grew up in High Point, NC
- Graduate, UNC– Chapel Hill with B.A. in Psychology
- Founder, Scott D. Sorrell Scholarship Southwest Guilford High School
- Board Member, Rotary Club of the Capital City
- Member, GAA UNC-Chapel Hill
- Resides in Downtown Raleigh