



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

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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
2017 Top 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