Scott D. Sorrell, CFP®, AIF®, AEP®, ChFC®, CLU®, CKA®, RICP®, CASL®, CLTC

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Capitol Financial Solutions

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 Registrations
- (CFP®) CERTIFIED FINANCIAL PLANNER™
- (AIF®) Accredited Investment Fiduciary
- (AEP®) Accredited Estate Planner
- (ChFC®) Chartered Financial Consultant
- (CLU®) Chartered Life Underwriter
- (CKA®) Certified Kingdom Advisor
- (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
- 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
    - President, 2020-2021
    - Paul Harris Fellow
- Member, Ram's Club UNC-Chapel Hill
- Member, GAA UNC-Chapel Hill
- Member, Bayleaf Baptist Church
- Resides in Raleigh with wife, Bethany, and daughter, Everleigh