



**Scott D. Sorrell, CLU®, ChFC®, AEP®, 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 Registrations
- (CLU®) Chartered Life Underwriter
- (ChFC®) Chartered Financial Consultant
- (AEP®) Accredited Estate Planner
- (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, Signator Investors, Inc., 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

Qualifying membership in the MDRT is based on minimum sales production requirements and gross business generated within a year. Each MDRT status designation is granted for one year only. All members must apply every year to continue their affiliation with the Million Dollar Round Table. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

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