Craig Horner, CFP®, ChFC® | Manager, Lead Financial Planning Consultant
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Craig Horner has over 20 years experience in the financial planning industry. Craig is a CERTIFIED FINANCIAL PLANNER™ certificant, and Chartered Financial Consultantr who achieved Senior Advisor status, representing the top 5% of American Express Financial Advisors during his 15 years there, and more recently, the Patriot level within LPL Financial Services and has Series 7, 63, and 24 licenses. He received the Mentzer Academic Scholarship to study math and music at the University of Iowa and subsequently taught computer music at the college level. Craig is also a member of Mensa

During his career he focused on estate and business planning, helping clients to establish charitable trusts, Family Foundations, ILITs, GRATs, and FLPs. Having a special needs child, he became an expert in Special Needs Trusts and the accompanying planning. He also worked with businesses in setting up qualified plans and executive compensation arrangements. Another area of focus was in end-of-life planning, maximizing the retention and transfer of assets to succeeding generations

Craig served three terms on the Board of Directors for the International Association of Financial Planning and has belonged to the Planned Giving Roundtable since 1989. He's served on the planned-giving boards of ten charitable organizations and served as President of the Board for the Southern Caregiver Resource Center. He has frequently been quoted in articles and has made numerous presentations regarding retirement, financial and estate planning

Craig plays the piano professionally several times a week with his wife Deborah on sax and flute. He is an accomplished runner and routinely wins his age class in local 5k and 10k running events