



CREATIVE FINANCIAL
S T R A T E G I E S

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David W. Wells, ChFC, CRPC®

Profile:

- Vice President, Creative Financial Strategies;
Registered Representative, Lincoln Financial Securities Corporation
- Over 20 years of experience in the financial services industry.
- Concentration in financial planning; retirement plans; retirement income positioning; wealth management; and business and estate planning.
- Former business owner and entrepreneur who readily identifies business issues and the application of practical solutions.

Education:

- Chartered Financial Consultant (**ChFC**)
The American College
- CHARTERED RETIREMENT PLANNING COUNSELOR SM (**CRPC®**)
College for Financial Planning
- Bachelor of Science, Administrative / Business Management
Clemson University

Financial Industry Regulatory Authority (FINRA) Registrations:

- FINRA Investment Co./Variable Contracts (Series 6)
- State Securities Law Exams
 - Uniform Securities Adviser Law Examination (Series 65)
 - Uniform Securities Agent State Law Examination (Series 63)