



A **HUB International** Company

1330 Lady Street, Suite 202  
Columbia, SC 29201  
Phone: 803.741.1001, extension 402  
Facsimile: 803.741.1004  
E-Mail: MHardy@4decisions.com



**Mason B. Hardy, CFP®, CPFA®, CRPC®**

## Profile

Wealth Management, Retirement & Private Wealth Advisor, Creative Financial Strategies; Registered Representative, LPL Financial LLC; Investment Advisory Representative, Global Retirement Partners LLC

Expertise in financial planning; retirement plans; retirement income positioning; wealth management; and financial decision making

Over 20 years of experience working with foundations and non-profit organizations

Prior experience as President of the South Carolina Association of Nonprofit Organizations (SCANPO), Executive Director of two hospital foundations in South Carolina, Director of Public Relations for a law firm, and Director of Government Relations for the South Carolina Hospital Association

## Education

CERTIFIED FINANCIAL PLANNER™ (**CFP®**)  
Certified Financial Planner Board of Standards

CERTIFIED PLAN FIDUCIARY ADVISOR (**CPFA®**)  
National Association of Plan Advisors (NAPA)

CHARTERED RETIREMENT PLANNING COUNSELOR<sup>SM</sup> (**CRPC®**)  
College for Financial Planning

Bachelor of Arts in Political Science  
The University of the South (Sewanee, TN)

CERTIFIED ASSOCIATION EXECUTIVE (CAE) (Ret.)

Leadership South Carolina

Riley Institute's Midlands Diversity Leaders Initiative  
Furman University (Greenville, SC)

Non-Profit Leadership Institute  
Francis Marion University (Florence, SC)

Association Healthcare Philanthropy's Madison Institute Planned Giving Certificate Program

## Financial Industry Regulatory Authority Registrations

FINRA General Securities Representative (Series 7)

State Securities Law Exams

Uniform Securities Advisor Law Examination (Series 66)

State Agent Registration: AR, DC, GA, NC, PA, SC, TN, VA

## Affiliations

Financial Planning Association, South Carolina Chapter and National Chapter  
South Carolina Chapter Current Member

Ben Lippen School Board Member

Leadership South Carolina former Board of Directors Member

Central South Carolina Chapter of the Association of Fundraising Professionals (AFP) former Board of Directors Member

Former South Carolina Society of Association Executives

Columbia Rotary Club, Past President and Member

Trinity Episcopal Cathedral in Columbia, SC

Resident License through South Carolina Department of Insurance

Non-Resident Licenses through Alabama Department of Insurance, Georgia Insurance Department, Hawaii Department of Commerce and Consumer Affairs - Insurance Division, New York State Department of Financial Services, North Carolina Department of Insurance, Tennessee Department of Commerce & Insurance, and Virginia Bureau of Insurance

---

### *Facilitating Financial Decisions Across America*

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Global Retirement Partners, LLC (GRP), dba Creative Financial Strategies, an SEC registered investment advisor. Insurance services offered through HUB International. GRP, Creative Financial Strategies, HUB Retirement and Wealth Management and HUB International are separate entities from and not affiliated with LPL Financial.