



A **HUB International** Company

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Terry A. Crenshaw, CFP®, ChFC, CPFA®, CRPC®

Profile

President, Creative Financial Strategies, and Creative Financial Strategies, LLC; Registered Principal, LPL Financial / Investment Advisory Representative, Global Retirement Partners; Managing Partner, Creative Financial Strategies Consulting Services, LLC; Senior Vice President, Wealth Management, Retirement & Private Wealth, HUB International

Practicing, teaching, consulting, and supervision experience for over 45 years in the financial services industry

Lectured nationally on the topics of Personal Financial Planning, Wealth Management and Financial Decision Making

Expertise in financial planning; estate planning; business continuation and disposition planning; investment planning; wealth management; financial decision making; and retirement plan evaluation and design

Broker Dealer supervision expertise and responsibilities related to General Securities and Investment Advisory Activities; including investment suitability review, advice review. Supervision and Compliance responsibilities at the level of Supervising Principal; Office of Supervisory Jurisdiction (OSJ)

Education

CERTIFIED PLAN FIDUCIARY ADVISOR® (**CPFA®**)

National Association of Plan Advisors

CHARTERED RETIREMENT PLANNING COUNSELORSM (**CRPC®**)

College for Financial Planning

CERTIFIED FINANCIAL PLANNER™ (**CFP®**)

CFP Board of Standards and Practices

CHARTERED FINANCIAL CONSULTANT (**ChFC®**)

The American College

CHARTERED LIFE UNDERWRITER (**CLU®**)

The American College

Bachelor of Arts in Sociology/Psychology

Furman University (Greenville, SC)

Financial Industry Regulatory Authority Registrations

FINRA General Securities Principal (Series 24)

FINRA General Securities Representative (Series 7)

FINRA Investment Co./Variable Contracts Principal (Series 26, Series 6)

State Securities Law Exams

Uniform Securities Adviser Law Examination (Series 65)

Uniform Securities Agent State Law Examination (Series 63)

State Agent Registrations: AL, AZ, CA, CO, DC, FL, GA, IL, IN, KS, ME, MD, MN, MS, MO, NJ, NY, NC, PA, RI, SC, TN, TX, VT, VA

Affiliations

Resident License through South Carolina Department of Insurance

Non-Resident Licenses through Arkansas Insurance Department, Florida Department of Financial Services, Georgia Insurance Department, New York State Department of Financial Services, North Carolina Department of Insurance, Pennsylvania Insurance Department, Tennessee Department of 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.