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William H. Phillips, CFP[®], CRPC

Profile:

- Executive Vice President, Creative Financial Strategies; Registered Principal, Lincoln Financial Securities Corporation; Managing Partner, Creative Financial Network.
- Over 27 years of experience in the financial services industry practicing, consulting, supervising and teaching.
- Lectured nationally on the topics of Personal Financial Planning, Retirement Planning, Personal Growth and Financial Decision Making.
- Expertise in financial planning; retirement plans; retirement income positioning; wealth management; and financial decision making.
- Broker Dealer supervision expertise and responsibilities related to General Securities and Investment Advisory Activities; including investment suitability review and advice review. Supervision and Compliance responsibilities at the level of Principal; Office of Supervisory Jurisdiction (OSJ).
- Frequent guest on SCETV Radio's South Carolina Business Review

Education:

- CHARTERED RETIREMENT PLANNING COUNSELOR SM (CRPC[®])
College for Financial Planning
- Master of Science in Financial Planning
College for Financial Planning
- CERTIFIED FINANCIAL PLANNER TM (CFP[®])
CFP Board of Standards and Practices
- Bachelor of Business Administration
Georgia State University

(Over)

Financial Industry Regulatory Authority (FINRA) 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)

Affiliations:

- Financial Planning Association, South Carolina Chapter and National Chapter
 - South Carolina Chapter Current Member
 - South Carolina Chapter Former Chairman
 - South Carolina Chapter Former President
 - South Carolina Chapter Former Board Member
- Brookhaven School of Success Inc.
 - Former Treasurer and Vice Chairman