

## A. Scott White

### CFP®, ChFC®, CLU®, MBA

Your family's estate, trust, tax, and wealth management needs require a financial advisor who has specialized training, certifications and experience. Scott White helps families with significant net worth develop estate and financial plans.

Scott's extensive professional credentials include:

- CERTIFIED FINANCIAL PLANNER ® professional (CFP®); Certified Financial Planner Board of Standards, Denver, Colorado – 1998
- Chartered Financial Consultant® (ChFC®); The American College, Bryn Mawr, Pennsylvania – 1992
- Chartered Life Underwriter® (CLU®); The American College, Bryn Mawr, Pennsylvania – 1991
- Master of Business Administration (MBA); University of Arkansas, Fayetteville, Arkansas – 1986
- Bachelor of Arts (BA); University of Arkansas, Fayetteville, Arkansas – 1984
- Member, Beta Gamma Sigma international business student honor society
- Member, Phi Alpha Theta honor society

Interviewed by The Wall Street Journal on utilizing charitable giving within a financial plan, Scott is past president of the Financial Planning Association Southwest Florida Chapter. He is past president of the Southwest Florida Chapter of the American Society of Financial Service Professionals, past president of the Estate Planning Council of Lee County, and founding president of the Planned Giving Council of Lee County. He served on the National Committee on Planned Giving's Leave a Legacy committee. He has been featured in the media and his articles have appeared in several print and online journals.

Scott and his wife, Adriana, have two grown children. They live in Fort Myers, where Scott is an active community volunteer. He is a former board member of Hope Clubhouse of Southwest Florida, a member of the board for the United Way of Lee County, and an Emeritus Board member for the Collaboratory formerly the Southwest Florida Community Foundation. Scott is also the past treasurer and an active member of the Fort Myers Rotary Club. The American Red Cross of Lee County honored Scott with its 2009 Legacy

Award in for his contributions in promoting and facilitating charitable giving in the Lee County community.

Check the background of this investment professional on FINRA's BrokerCheck