



William M. Biles, CFP®, CAP®

Insurance Consulting & Design
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Background & Experience

Will has over 20 years of experience in the financial services industry. Will's focus over the last several years has been to support bankers and financial advisors throughout the Southeast in their efforts to address the Risk Management elements of their financial planning process. As a CFP®, Will adds a unique perspective to the Risk Management discussion, with a focus on structuring insurance strategies as a cohesive part of the overall plan.

Previously, Will was an insurance vice president with SunTrust Bank covering NC, SC, TN, and VA. Will also ran his own Managing General Agency for Travelers/Citigroup brokering life insurance to some 300 agents and registered reps throughout North and South Carolina.

Will is a proud Veteran of the United States Marine Corps. He earned a Bachelor of Science from Southern Illinois University and a Master of Science in Business Administration from Boston University. He holds a CFP® designation, as well as a CAP® designation, a Life, Accident and Health, and Long-Term Care license. He also holds the following Securities Licenses: Series 6, Series 7, and Series 66.

Will and his wife Donna live in Charlotte.