

**DESIGNATIONS AND
EXPERIENCE**

- Designations** CFP®: CERTIFIED FINANCIAL PLANNER™ professional
AIF®: Accredited Investment Fiduciary®
CLTC: Certification in Long Term Care
- Prior Experience** Competition Analyst: John Hancock Life Insurance Co., 2003-2006
Produced detailed comparative analysis of complex insurance products.
Trained high-level advisors on the appropriate use of insurance products to solve complex problems for their clients.
- Speaker** National Financial Partners [NFP] Annual Meeting, Chicago, IL
Addressed top producers on innovative uses of insurance products.
Signator Investors, Inc. Practice Advancement Conference, Orlando, FL
Main platform presentation on practice management and client service.

**MEMBERSHIPS AND
INVOLVEMENT**

- Member** Boston Estate Planning Council
National Association of Insurance and Financial Advisors [NAIFA]
4 under 40 Award Recipient
Million Dollar Round Table [MDRT], Top of the Table
Chair of the Pre & Post Retirement Committee
Finance Committee
Chair of the Advanced Planning Task Force
Sudbury Chamber of Commerce
Distinguish Service Award
- Charitable** Habitat for Humanity, Fundraising & Construction for Wayland, MA build
Copper Hammer Sponsor
Seeds of Peace – Sponsored multiple grants from the MDRT Foundation
Children’s Hospital, Boston, MA, Boston Marathon Team “Miles for Miracles”
- Community** Trustee, The Sudbury Foundation Board
Director, Sudbury Youth Lacrosse Board
Youth Soccer & Lacrosse Coach, Sudbury, MA
- Captain** Colby College [the Mules] Lacrosse Team

EDUCATION

Colby College, B.A., Cum Laude
Boston University, Certificate in Financial Planning [CFP®]

SPENCER FINANCIAL, LLC

327A Boston Post Road, Sudbury MA. 01776
Phone (978) 443-6500 x 104 FAX (978) 443-6550
Email: bill@spencerfinancial.com
www.yourretirementsolution.com
