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Sherry V. Wyble, CFP®, CDFA™ Professional Qualifications



Position and Experience

Owner of Scott Private Wealth Group, a wealth management firm providing financial life planning for the affluent in transition. Over 15 years experience. Career independent advisor.

Primary emphasis on Divorce Financial Planning. Works with family law attorneys and divorcing individuals throughout the Southeast to provide financial planning advice and recommendations for equitable distribution settlements. Services include evaluation of assets and financial documentation, examination of income tax issues applicable to the divorce settlement, work with attorney to create a fair and equitable settlement offer, provide analysis and recommendations for divorce mediation, work with attorney to prepare trial exhibits and provide expert analysis, provide client with financial recommendations for long-term financial planning. Experience includes national high profile ED cases.

Professional Designations and Certifications

- CFP®: Certified Financial Planner, *College for Financial Planning, 2003.*
- CDFA™: Certified Divorce Financial Analyst, *Institute of Divorce Financial Analyst, 2004.*
- Series 7 Licensed: General Securities Representative, *Financial Industry Regulatory Authority (FINRA), 1996.*
- Series 63 Licensed: Uniform Securities Agent, *Financial Industry Regulatory Authority (FINRA), 1996.*
- Series 65 Licensed: Uniform Investment Advisor, *Financial Industry Regulatory Authority (FINRA), 1996.*
- Licensed Life and Health Agent: *North Carolina Department of Insurance, 1997.*

Education

- Bachelor of Science, Double Concentration: Finance / Risk Management, University of North Carolina at Greensboro, Greensboro, NC (1993).
- Masters of Financial Planning, College for Financial Planning, Current Student.
- Guilford College, Bachelor of Science, Accounting, Current Student.

Professional Organizations

- Financial Planning Association
- Institute for Divorce Financial Analysts
- Academy of Financial Divorce Practitioners



Community Service

- Volunteer speaker for "Financial Literacy Week", January 2010.
- United Way of Greater Greensboro Young Leader
- Compassion International Advocate

Honors / Awards

- Recognized by the Consumers Research Council of America as one of "America's Top Financial Planners", 2009.
- 2009 Best of Greensboro Award by the US Commerce Association.

Lecturer / Instructor

- *Divorce in the Golden Years*. Co-presenter. NC Family Law Specialists Conference, Asheville, NC, July, 2011.
- *Practice Management for a Divorce Planning Practice*, Institute for Divorce Financial Analysts Annual Conference, June 2011.
- *Divorce Planning Issues*. Society of Financial Service Professional Annual CE Day, May 2010.
- *Financial Expert Witness Testimony*. Triad Collaborative Law Meeting, March 2010.
- *Preparing Solid Financial Affidavits*. Dirty Thirty Paralegal Meeting, Pinehurst, NC, January 2010.
- *DivorceCare*, Calvary Church, Greensboro, NC, 2006, Lawndale Baptist Church, Greensboro, NC, 2008.
- *Working with Legal Professionals*. Advanced Topics Meeting, Institute for Divorce Financial Analysts, June 2007.
- *Financial Peace (Dave Ramsey)*. Christ Community Church, Greensboro, NC, Spring 2007.
- *Personal Financial Planning and Organization*. Dirty Thirty Paralegal Meeting, Pinehurst, NC, 2006.
- *Divorce Financial Planning*. Greensboro Family Law Council Breakfast, Greensboro, NC, 2005.

Articles Published

- *Bringing Added Value to Your Client Relationships*. North Carolina Family Law Forum, May 2004.
- *Investing Post Divorce*. North Carolina Family Law Forum, April 2007.

Divorce Related Education

- *Institute for Divorce Financial Analysts Advanced Topics*. Tampa, FL, Institute for Divorce Financial Analysts, February 2011.
- *NC Family Law Intensive*. Asheville, NC, October 2009.
- *6th Annual ADFP Conference*. New York, NY, Association of Divorce Financial Planners, September 2008.
- *Institute for Divorce Financial Analysts Advanced Topics*. Las Vegas, NV, Institute for Divorce Financial Analysts, July 2007.
- *AICPA / AAML Conference on Divorce*. Las Vegas, NV, AICPA / AAML, 2008.
- *AICPA / AAML Conference on Divorce*. Las Vegas, NV, AICPA / AAML, 2006.
- *Institute for Divorce Financial Analysts Advanced Topics*. San Antonio, TX, Institute for Divorce Financial Analysts, February 2006.
- *Institute for Divorce Financial Analysts Advanced Topics*. Philadelphia, PA, Institute for Divorce Financial Analysts, October 2005.