



William M. Biles, CFP®, CAP®

Insurance Consulting & Design
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Background & Experience

Will Biles serves as the President of Insurance Consulting and Design. With over 30 years of experience in the financial services industry, Will's specialties include qualified planning utilizing defined benefit plans, philanthropic planning as part of the overall estate plan, wealth transfer techniques using qualified and non-qualified asset strategies, and business succession planning.

Will earned a Bachelor of Science from Southern Illinois University and a Master of Science in Business Administration from Boston University. He is a CFP® certificant and earned the CAP® designation (Chartered Advisor in Philanthropy) from the American College. Will holds his Life, Accident and Health, and Long-Term Care licenses, as well as a Series 6 (Investment Company Products/Variable Contracts Limited Representative), a Series 7 (General Securities Representative), and a Series 66 (NASAA Uniform Combined State Law Examination) license.

Will is a proud veteran of the United States Marine Corps and he and his wife Donna live in Charlotte.

Certifications & Education

- Southern Illinois University – Bachelor of Science
- Boston University – Master of Science in Business Administration
- Certified Financial Planner, CFP®
- Chartered Advisor in Philanthropy, CAP®
- Life, Accident and Health, and Long-Term Care Licenses
- FINRA Series 6, Series 7, and Series 66 Licenses