Scott H. Iverson, CFP, CHFC, CEBS, CRPS

Senior Vice President + Wealth Advisor

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SPECIALTIES

Wealth Management | Tax-Efficient Investing | Retirement Planning | Employee Benefit Plans | Financial Planning | Insurance

PROFESSIONAL PROFILE

Scott is Senior Vice President of Claris Advisors and has served as a wealth advisor for Claris since 2015. He has a vast amount of experience in assisting clients with portfolio management and financial planning. He specializes in providing comprehensive advice on tax-efficient investing, retirement plans, employee benefit plans and insurance. Working as a fiduciary, Scott has spent his career always putting his clients' interests first. He has over 16 years of experience in the financial industry and holds several certifications, including Certified Financial Planner™ (CFP®). Scott earned bachelor's and master's degrees in finance from Stetson University. As a team member of Claris, Scott believes in always doing what is right for his clients and he views them as family.

EDUCATION & CERTIFICATION

- Chartered Retirement Plans Specialist(CRPS), College for Financial Planning
- Certified Employee Benefits Specialist (CEBS), International Foundation of Employee Benefit Plans
- Chartered Financial Consultant (ChFC), The American College of Financial Services
- Certified Financial Planner (CFP), CFP Board
- M.B.A., International Finance, Stetson University, DeLand, FL
- B.S., Finance, Stetson University, DeLand, FL