Scott D. LaValley, CFP®, CVA®, CRPC®, MSFS, CLU, ChFC*

Managing Director, Baldwin & Clarke Advisory Services, LLC

Office Location:

1 Bedford Farms Drive
Suite 102
Bedford, NH 03110

O: (603) 668 – 4353
D: (603) 206 – 3734
E: scottlavalley@baldwinclarke.com
(advisory services)
slavalley@osaicfs.com
(securities/investments)

Certifications:

Series 26, 6, 63

Education:

B.S. – University of New Hampshire

Master of Science in Financial Services – The American College

Professional Qualifications:

Certified Financial Planner (CFP)®

Certified Valuation Analyst (CVA)®

Chartered Retirement Planning Counselor (CRPC)®

Chartered Life Underwriter (CLU)

Chartered Financial Consultant (ChFC)

Scott D. LaValley has been with BaldwinClarke since 1982 and currently serves as the Managing Director of the Financial Planning arm of Baldwin & Clarke Advisory Services, LLC.

Scott and his staff are responsible for the preparation of wealth accumulation plans, wealth preservation plans, comprehensive financial plans, value driver planning and business owner exit planning. Each plan is custom designed and tailored to fit the specific goals and circumstances of the client.

Scott believes that an integral part of every plan is educating clients about the techniques that will help them accomplish their planning goals and objectives and then help them to understand the impact that it will have on their lives. Only after clients thoroughly understand the options available to them, can they make an informed decision and chart a confident course of action. Scott's comprehensive approach to planning is iterative, whereby he works with clients over time to monitor and perhaps re-chart the course to accommodate any changes. Scott is also responsible for the design of non-qualified Executive Benefit Programs custom designed to help a business owner reward and retain valued executives.

Scott holds a bachelor's degree (Magna Cum Laude) from the University of New Hampshire and a master's degree in financial services from the American College of Bryn Mawr, Pennsylvania. Scott is a CERTIFIED FINANCIAL PLANNER™ practitioner, Certified Valuation Analyst, Chartered Retirement Planning Counselor, Chartered Financial Consultant, and a Chartered Life Underwriter. The CERTIFIED FINANCIAL PLANNER™ (CFP) designation is granted by the Certified Financial Planner Board of Standards, Inc. and comes with extensive training in financial planning, estate planning, insurance, investments, taxes, employee benefits and retirement planning, as well as in CFP Board's Standards of Professional Conduct, which are rigorously enforced. The Certified Valuation Analyst (CVA) credential is granted by the National Association of Certified Valuators and Analysts (NACVA) only to qualified individuals with considerable professional experience in the field of business valuation.

Scott is also involved in several industry organizations and has had the opportunity to be a featured speaker at many events.

Disclosure:

** Scott LaValley is an Independent Insurance Broker and a Consultant with Baldwin & Clarke, LLP (one of the companies within BaldwinClarke). Securities offered through **Osaic Wealth, Inc.,** member FINRA/SIPC. Independent advisory services offered through Baldwin & Clarke Advisory Services, LLC (BCAS). **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth.** LFS-6557121-041624*