



INSIGHTS

Speaker Biography

Alan Norris CFP®, AIF®

Alan Norris, CFP®, AIF® is the owner of Norris Wealth Management, LLC an independent fee-only, Registered Investment Advisor. He specializes in providing a fiduciary standard of care to the participants and sponsors of profit sharing 401(k) plans. During his 25 plus years in the financial services industry his contributions toward improving the industry include:

- Serving as President of the Greater Phoenix Financial Planning Association (2004)
- Presenting CFP® ethics continuing education sessions
- Volunteering vast amounts of time educating the public on the value of financial planning

Alan has contributed to several personal finance and 401(k) related articles in The Arizona Republic since 2007. The most recent was Employers required to provide more information about 401(k) fees.

He earned a Bachelor of Science in Finance at the University of Oregon and is a member of The Committee for the Fiduciary Standard.

