

# William Biles, CFP®

*Vice President*

Highland Capital Brokerage-Mid-Atlantic

15801 Brixham Hill Avenue  
Suite 450  
Charlotte, NC 28277

**Email:** wbiles@highland.com  
**Cell:** 828.265.9512  
**Office:** 800.849.3553



Will Biles, serves as Vice President for Highland Capital Brokerage – Mid-Atlantic. With 30 years of experience in the financial services industry, Will's specialties include qualified planning utilizing defined benefit plans, wealth transfer techniques using qualified and non-qualified asset strategies, and business succession planning. Will's sole focus is supporting our Sun Trust Private Wealth partners with advanced concepts and techniques that their planning process brings to light. Will works with the entire Sun Trust Private Wealth team throughout the Carolinas and Virginia.

Prior to joining Highland Capital Brokerage, Will ran his own Managing General Agency for Travelers/Citigroup to include life insurance brokerage, group health brokerage, securities marketing and management, and pension administration and management to some 300 agents and registered representatives throughout North and South Carolina. Most recently, he was responsible for managing the insurance platform for Sun Trust Private Wealth in the Carolinas and Tennessee. Will is also a proud veteran of the United States Marine Corps.

Will earned a Bachelor of Science from Southern Illinois University and a Master of Science in Business Administration from Boston University. He 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 and his wife Donna live in Charlotte.

## ABOUT HIGHLAND CAPITAL BROKERAGE

Highland Capital Brokerage is committed to partnering with financial advisors and insurance professionals using our core competencies of life insurance, annuities, and long-term care. We distinguish ourselves by providing point-of-sale support, advanced marketing, and creative estate and business planning techniques. We provide these services in an efficient, client-focused environment that extends to carrier and product expertise, underwriting negotiation, and complete back office processing. For more information, visit [www.highlandbrokerage.com](http://www.highlandbrokerage.com).

William Biles is Securities Licensed Through Investacorp, Inc.  
A Registered Broker/Dealer, Member FINRA, SIPC.

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