

# Philip Orwig | CFP®

## Financial Advisor



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Phil is a Certified Financial Planner™ practitioner, and has been helping his clients plan for retirement and manage their investments since 2010. Phil joined the firm in 2011 after beginning his career with LPL Financial in Louisville, Kentucky. In addition to having the prestigious CFP® certification, Phil also holds the Series 7 & 66 licenses, and a Texas life and health insurance license.

Phil specializes in helping folks going through life's many transitions. Whether it's the birth of a child or grandchild, an unexpected career change, the selling of a business or a death/divorce, Phil is able to work with clients to plan effectively and prepare in earnest for the next chapter in their lives.

Phil graduated from Southern Methodist University where he earned a Bachelor of Arts in Communications with a Minor in Psychology. Phil is a member of the Rotary Club of Carrollton-Farmers Branch, where he serves on the Board as the Community Service Director. He had previously served in the role of Communications Director from 2012-2015 .

When Phil is not working or giving back to the community, he enjoys competing in long-distance running, reading, cooking, traveling and spending time with his wife, Sarah, and their Boston Terriers Maddy and Remy .



## MUNN & MORRIS

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