

## William Hocutt, CFP<sup>®</sup>, CPA

Partner

whocutt@bridgeworthllc.com  
205.208.8755 — Birmingham, AL

*"I view financial planning as providing my clients a roadmap for the future. However, it is not something you create and hand over to them. I believe in walking that road with them, being a guide – helping make adjustments when the landscape changes."*

William specializes in working with families preparing for retirement. This includes analyzing both the best vehicles to accumulate wealth and devising distribution strategies to help ensure clients meet their long-term goals.

Choosing proper investments, talking through what really determines returns, analyzing when to take social security, discussing the tax effects of actions, and taking an overall look at the financial situation are just some of the areas where William provides guidance. William works both one-on-one with clients and is available for group presentations.

Originally from Tuscaloosa, William now lives in Vestavia Hills with his wife, Aubrey, and their three children, John Harris, Thomas, and Vivi. They are active members of Vestavia Hills United Methodist Church, where William leads a Sunday school class and serves on various boards. When he is not at work, William can usually be found coaching one of his children's little league teams.



### AFFILIATIONS

- American Institute of Certified Public Accountants: 1999 - present
- Financial Planning Association of North Alabama: Board of Directors 2011- 2016; President 2015
- G2 Leadership Institute Class: 2021-2022
- Alabama Society of Certified Public Accountants: 1999 - present
- Leadership Vestavia Hills: 2007
- Vestavia Hills United Methodist Church: Foundation Board 2013- 2016; Finance Committee 2017 - 2020, Sunday School Class Leader 2009 - present
- Civitan of Vestavia Hills: Treasurer 2008- 2009
- Youth Coach: 2012 - present
- Vestavia Hills School Foundation Board: 2017 - 2021, Treasurer-Elect 2018

### EDUCATION

- University of Alabama, 1998, *cum laude*, Bachelor of Science in Commerce and Business Administration
- University of Alabama, 1999, Master of Accountancy
- CPA, 2001
- CERTIFIED FINANCIAL PLANNER<sup>™</sup>, 2006