

Thought Leadership



James Magner
JD, CLU®, ChFC®

Premium Financing, Non-Qualified Executive Benefits, Succession Planning

Case Consultation



Cynthia Hearing, JD, CExp™, CLU®, ChFC®, CLTC, CAP®

Succession Planning, Buy-Sell Planning, Estate Planning, Non-Qualified Executive Benefits, Charitable Planning, Asset Protection



Mark Brumbaugh, JD

Non-Qualified Executive Benefits, Succession Planning, Estate Planning, Asset Protection, Charitable Planning



Arthur Gravanis
JD, LL.M, CLU®, CRPS

IRA Distribution Planning, Estate Planning, Long Term Care Planning, Asset Protection, Succession Planning, Non-Qualified Executive Benefits, Charitable Planning



Desiree Day, JD

Succession Planning, Asset Protection, Estate Planning, and Non-Qualified Executive Benefits.

Qualified Plans



Jonathan Sacks, CRPS

Qualified Plan Design, Defined Benefit Plans, Defined Contribution Plans, Life Insurance Inside Qualified Plans, Economic Benefit Costs



Paul McDonald

Succession Planning, Key Person, Non-Qualified Executive Benefits, PPIA Opportunities, Advanced Case Design Product Questions



Jeffrey Klappholz, CLU®

GPS Advanced Presentations, Premium Financing, Guaranteed and Simplified Issue, Inforce Illustrations, Split Dollar Economic Benefit Rate Tables



Eric Brandon, EA, MAAA, MSEA, FCA

Qualified Plan Design, Defined Benefit Plans, Defined Contribution Plans, Life Insurance Inside Qualified Plans, Economic Benefit Costs



Jennifer Wilhelmy

GPS Advanced Presentations, Executive Bonus Plans, Premium Financing, SERPs, Succession Planning, Split Dollar



Hang Wong, FLMI

GPS Advanced Presentations, Executive Bonus Plans, Premium Financing, SERPs, Succession Planning, Split Dollar

Business Development and Sales Campaigns



Cynthia Crino
CLU®, ChFC®

End-to-End Sales Process, BRC Collateral, Advanced Sales Campaigns



Julie Falcon

End-to-End Sales Process, BRC Collateral, Advanced Sales Campaigns