



# Capitas Financial Overview

Morgan Stanley

RAYMOND JAMES®



STIFEL SYNOVUS®



## CAPITAS

Capitas Local Directors of Private Wealth and their team are supported by an industry leading and nationally recognized Private Wealth Centers.

As a Firm, Capitas is positioned to support Bank of America Private Bank's goal of incorporating protection strategies and wealth transfer solutions into your clients' overall estate, business or financial plans.

Through one of the industry leading collaboration of local and national Capitas resources, we can offer a highly customized approach required for your Ultra High Net-Worth Clients.

INSTITUTIONAL ACCOUNTS

INSURANCE CARRIERS

### 11 Permanent Insurance Carriers



### 10 Term Insurance Carriers



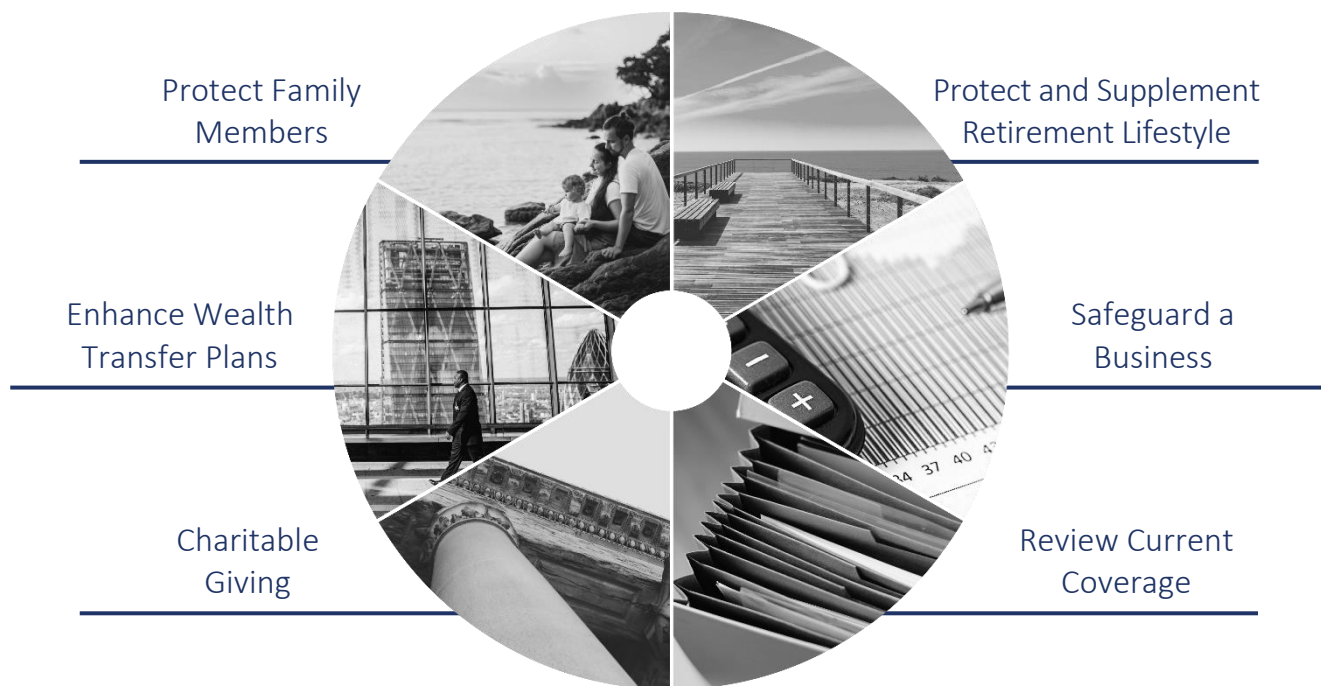
\*All logos are the property of their respective owners.

Capitas Financial, Inc. (Capitas) provides life insurance marketing support and case management services to Merrill. Capitas is not an affiliate of Bank of America Corporation. For Financial Professional Use Only. Not intended for use in solicitation of sales to the public. Financial advisors do not provide tax, legal or accounting advice. Clients should always consult with their independent attorney and/or tax advisor before implementing any financial, tax, or estate planning strategy.

Partnering with you to  
help make your client's  
financial lives better



Capitas can develop strategies that address Bank of America Private Bank client's unique planning objectives and needs for the Ultra High Net Worth marketplace.



## Bank of America Private Bank

### Supported by the Capitas Financial Team – Led By Local Director of Private Wealth

Director of  
Private Wealth

Point of Sale  
Support

Internal Account  
Executive

Case  
Designer

Case  
Manager

### Collaborating with the National Capitas Financial Private Wealth Centers

Wealth Transfer &  
Estate Planning

Premium  
Finance

Business Planning /  
Succession

Executive  
Planning

*The local Capitas Support Team along with the national Private Wealth Centers can provide case consultation and planning options to enable financial advisors to enhance their practices by effectively integrating life insurance into the client's overall estate, business or financial plans.*

For Financial Professional Use Only. Not intended for use in solicitation of sales to the public. | ML24-005190