CAPITAS FINANCIAL
VALUE BEYOND INSURANCE

Capitas Financial Overview

INSTITUTIONAL ACCOUNTS

- Morgan Stanley
- Raymond James
- UBS
- Arvest
- Baird
- Benjamin Edwards, Inc.
- Citizens
- Janney
- KeyBank
- Oppenheimer
- RBC
- Stifel
- Synovus
- usbancorp Investments, Inc.
- Willis

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.

INSURANCE CARRIERS

11 Permanent Insurance Carriers

- corebridge financial
- John Hancock
- Legal & General America
- Lincoln Financial
- MassMutual
- Nationwide is on your side
- Pacific Life
- Prudential

10 Term Insurance Carriers

- corebridge financial
- John Hancock
- Legal & General America
- Lincoln Financial
- Nationwide is on your side
- Principal
- Prudential
- Symetra Retirement | Benefits | Life
- Transamerica

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

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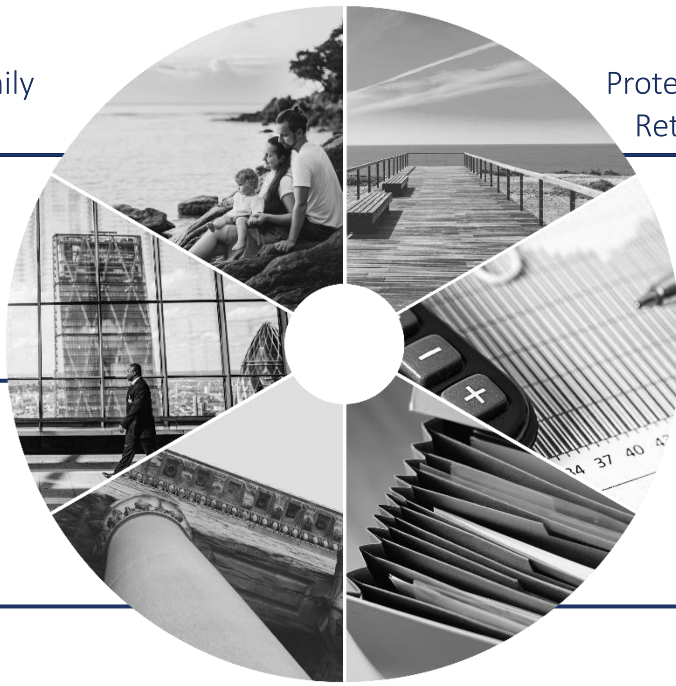
Capitas can develop strategies that address Bank of America Private Bank client's unique planning objectives and needs for the Ultra High Net Worth marketplace.

Protect Family Members

Protect and Supplement Retirement Lifestyle

Enhance Wealth Transfer Plans



Safeguard a Business

Charitable Giving

Review Current Coverage

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.