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 Merrill's goal of incorporating protection strategies and wealth transfer solutions into your client's 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 Distributors
MassMutual
Nationwide is on your side
Pacific Life
Prudential

### 10 Term Insurance Carriers

corebridge financial
John Hancock
Legal & General America
Lincoln Financial Distributors
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 Merrill client's unique planning objectives and needs for the Ultra High Net Worth marketplace.

Protect Family Members

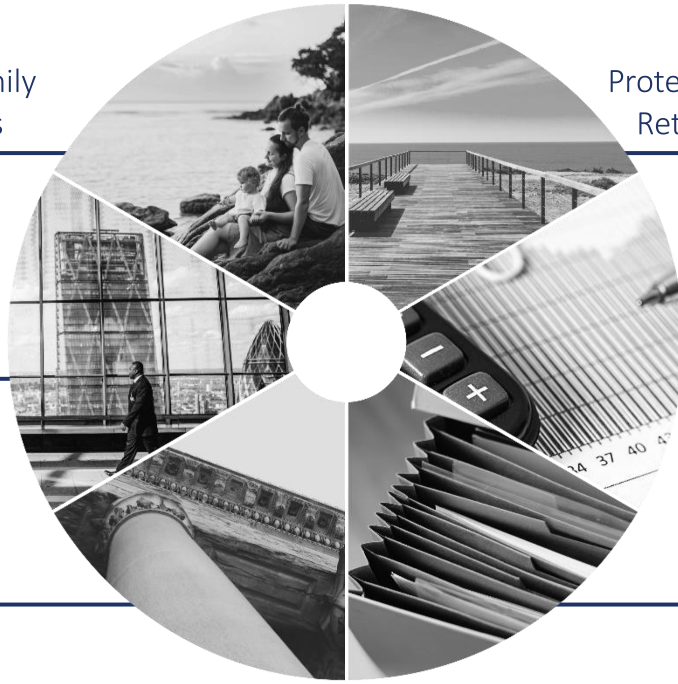
Protect and Supplement Retirement Lifestyle

Enhance Wealth Transfer Plans

Safeguard a Business

Charitable Giving

Review Current Coverage



## Bank of America Private Bank

## Merrill Private Wealth Management

### 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.*