

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 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.

INSTITUTIONAL ACCOUNTS

INSURANCE CARRIERS

11 Permanent Insurance Carriers



10 Term Insurance Carriers

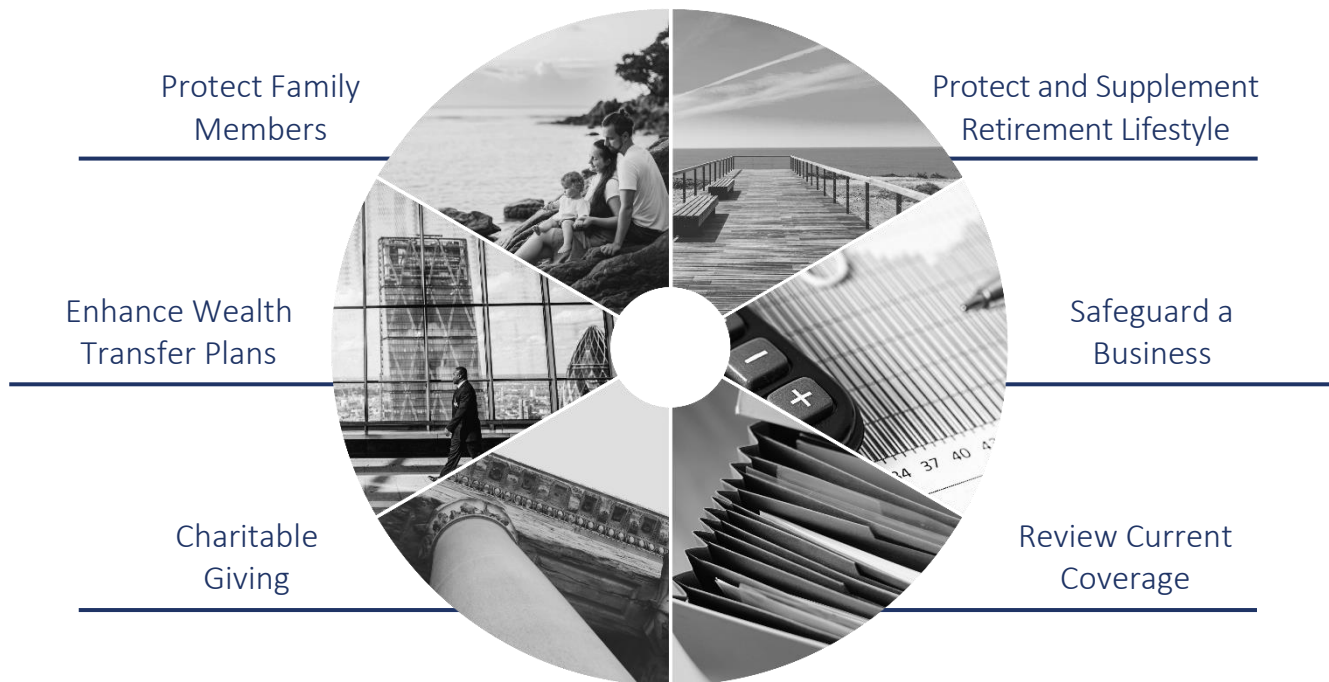


*All logos are the property of their respective owners.

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



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



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.