Local Capitas Private Wealth Team

The local Capitas Private Wealth team is comprised of the following members: Team Leader – Director of Private Wealth, Point of Sale Support, Internal Account Executive, Case Designer and Case Manager.

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.

Local Capitas Private Wealth Team	
Team Leader – Director of Private Wealth	Primary contact for Merrill Advisors in designing insurance solutions
Point of Sale Support	Supports Team Leader in field as needed
Internal Account Executive	Supports the Sales and New Business process
Case Designer	Carrier/Product analysis, case quotes and illustrations
Case Manager	Manages New Business and Underwriting process