

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.

Arkansas, Kansas, Missouri & Oklahoma



Thomas Alexander

Team Leader - Director of Private Wealth

The Blair Agency – Capitas Financial, Inc.

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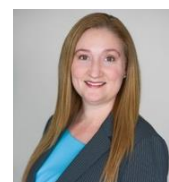
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Bank of America Private Bank

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



Thomas Alexander

Director of Private Wealth for The Blair Agency

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BUSINESS EXPERTISE

Executive Compensation Planning
Advanced Estate Planning

Business Continuation Planning
Financial Products Analysis & Design

Retirement Planning

BIOGRAPHY

Tom joined Capitas in 2010. As a Director of Private Wealth, he is dedicated to providing superior point-of-sale support in the areas of individual and business insurance planning. Tom brings over 30 years of experience in the financial services industry. Prior to joining the Capitas team, he was a Senior Account Executive with The Hartford. Tom has extensive experience partnering with financial advisors, insurance agents, bankers, and CPAs in helping with advanced planning strategies for their clients. He also holds his series 6 and 63 insurance licenses.

In 1998, Tom was appointed by Governor Mike Huckabee to the Arkansas Ethics Commission, and served as Chairman in 2001. Prior to his appointment, Tom held public office while living in Little Rock. He was appointed to the Arkansas Insurance Commissioners Life and Health Advisory Task Force in 1998. He is a member of the National Association of Insurance and Financial Advisors, where he has formerly served on both local and state boards. Tom currently resides in Rogers, AR with his wife, Tracy. They have three children: Hunter, Ryan and Bailey. Tom is an active member of his community and church. He enjoys spending time with his family, politics, and anything outdoors.

THE BLAIR AGENCY

The Blair Agency offers the professional financial advisor one stop access to a broad spectrum of insurance products from the finest insurance carriers. Since 1972, we have served the needs of brokers and advisors in Missouri, Arkansas, Kansas, Oklahoma and southwest Illinois with a full range of “value added” support resources to assist in properly integrating insurance products into an overall financial or estate plan.

Our staff provides expert point of sale assistance and a full service experienced back office. The combination of our local service and support with the Capitas Financial network of member firms is unmatched in the insurance industry. We are committed to your success.

CAPITAS FINANCIAL, INC.

Capitas Financial is the premier partner for Financial Advisors, providing insurance solutions for investment, tax, retirement, estate, business and financial life planning needs. Formed in 2001, Capitas Financial was founded on the strength and reputation of its founding members and was created to establish strong and strategic alliances with leading insurance carriers and financial institutions.

Securities offered through: The Leaders Group, Inc. member FINRA / SIPC 26 W. Dry Creek Circle, Ste. 800 Littleton, CO 80120 (303) 797-9080.



Jessica Ingram

Director of Private Wealth for The Blair Agency

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BUSINESS EXPERTISE

Interpersonal Communications
Requirements & Systems

Underwriting & New Business Specialist
Business & Legacy Planning

National Account Compliance
Personal Insurance Uses

BIOGRAPHY

Jessica started her insurance brokerage career in 1999 providing customer service for personal lines and graduated to a Marketing Coordinator position in group benefits. It was in that role, in 2002, that she became a licensed Life and Health Insurance Broker. In her time with The Blair Agency, she has advanced to a Senior Case Manager title, now Director of Private Wealth. With nearly two decades of experience in the insurance brokerage industry she has developed extensive knowledge of procedures, products, compliance, and client relations. She works very closely with independent and national account advisors as well as high profile clients. Jessica holds her Series 6 & 63 securities licenses.

Jessica, her husband Alex, and their son Reece love to travel and spend time at the family lake property in central Illinois. She and her husband are members of the Gateway Precision Lawn Chair Krewe and Drill Team, a group that has been performing in the St. Louis Mardi Gras and St. Patrick's Day Parades for the past 30 years.

THE BLAIR AGENCY

The Blair Agency, a founding member of Capitas Financial, is the premier provider of life, long term care and disability insurance to financial professionals, and advisors who provide advice regarding insurance needs as a part of their professional practice. The Blair Agency offers advisors one stop access to a broad spectrum of insurance products from the finest insurance carriers. Since 1972 The Blair Agency has served the needs of brokers and advisors in Missouri, Arkansas, and Kansas, Oklahoma and southwest Illinois with a full range of "value added" support resources to assist in properly integrating insurance products into an overall financial or estate plan.

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