Capitas Private Wealth Team

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.

Connecticut, Massachusetts, Maine, New Hampshire, New York (Excluding NYC & Long Island), Rhode Island & Vermont

Daniel Ashe

Team Leader - Director of Private Wealth

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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

Daniel Ashe

Director of Private Wealth for Smith Companies, Ltd.
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BUSINESS EXPERTISE

Executive Compensation Planning
Business Continuation Planning
Retirement Planning
Advanced Estate Planning
Financial Products Analysis & Design

BIOGRAPHY

Dan started his insurance career in 1992 as a financial advisor with Cigna Financial Advisors, specializing in planning solutions for high net worth business owners and individuals. In 1994, Dan joined Cigna Life Brokerage as the VUL specialist. In this role he was responsible for the training of wholesalers and working with financial advisors throughout the country. In 1996, he joined The Hartford as an Account Executive working to develop and support efforts of wirehouse brokers and institute life insurance sales into their practice. Dan left The Hartford in January of 2000 for a position as the New England Field Vice President for Pacific Life's wirehouse team. For the next seven years he wholesaled Pacific Life's individual and business focused insurance products with wirehouse financial advisors and brokerage general agencies within the region.

In 2007, Dan joined Sun Life Financial as a Sales Vice President. During this time, he worked to distribute their products both through brokerage general agencies, as well as directly to independent financial advisors. Dan's focus was largely on identifying and administering executive benefit and business continuation sales with Sun Life's institutional insurance portfolio. In 2012, Dan joined The Smith Companies as a Director of Private Wealth in an effort to establish an executive benefit division within the general agency. Today he is part of a successful team which caters to the individual and corporate needs of financial professionals with a focus on small and large business markets.

SMITH COMPANIES, LTD.

Smith Companies, Ltd. is the premier provider of life, long term care and disability insurance to financial service professionals, attorneys, accountants, bank trust officers and other advisors who provide their clients with advice regarding insurance needs as a part of their professional practice.

We offer the professional financial advisor with "one stop" access to a broad spectrum of insurance products from the finest insurance carriers. We offer another advantage, which our competitors cannot match, a full range of "value added" support resources to assist in properly integrating the insurance product into the overall financial or estate plan.

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.

Andrew Ahern

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BUSINESS EXPERTISE

Executive Compensation Planning
Advanced Estate Planning
Business Continuation Planning
Financial Products Analysis & Design
Retirement Planning

BIOGRAPHY

Andrew works as a sales partner in the New York and New England territories. As an expert on products and illustrations, Andrew's focus is on providing proposals for clients' unique situations as well as assisting in the application and underwriting process.

Andrew began his career as a financial advisor with Ameriprise Financial in 2007 and continued to work in sales with Sun Life Financial before joining the Smith Companies in 2012.

Andrew earned his Bachelors in Economics from the University of Massachusetts at Amherst in 2007. He also holds his series 7 and 66 insurance licenses.

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