

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.

Indiana, Southwestern Ohio & Georgia



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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



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BUSINESS EXPERTISE

Retirement Planning
Advanced Estate Planning
Policy Loan Rescue & Policy Valuation

Business Continuation Planning
Private Financing

Long Term Care
Disability Insurance

BIOGRAPHY

D. Lee Beall is a Director of Private Wealth at Rushing Financial Group, a partner firm of Capitas Financial, Inc, and has 18 years of experience in the life insurance industry. Lee joined Rushing Financial Group in August 2014 as a Sales Vice President, now Director of Private Wealth. Prior to his current role, Lee held roles at Northwestern Mutual and at Highland Capital Brokerage. Lee works on a collaborative basis with financial advisers, attorneys, and CPA's to accomplish the estate and business planning objectives of their clients.

A graduate of the University of Georgia's Terry College of Business, Lee currently holds his Chartered Life Underwriter® (CLU® as well as his Series 7 and 66 securities registrations. He is a member of the North Georgia Estate Planning Council, FINSECA, and is a regular attendee of NAEPC.

Today, he currently resides in Georgia with his wife, son and two daughters. Spending time with his family, hiking, trail running, gardening, hunting, fishing, cooking, golfing, and shooting sporting clays are some of his favorite activities to do in his spare time.

RUSHING FINANCIAL GROUP

Rushing Financial Group is an advanced insurance planning organization, offering a full range of carriers for life insurance, disability income, annuities, long-term care and investment related products. Our firm provides planning support to our professional partners throughout Indiana, Georgia and the greater Cincinnati, Dayton, Ohio areas.

Experienced underwriting, training and advanced sales support gives our customers a distinct advantage in an increasingly competitive marketplace. Our goal is to understand and meet the unique needs of successful professionals and their affluent clientele.

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.