

*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



### **D. Lee Beall, CLU®**

#### **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



## D. Lee Beall, CLU®

*Director of Private Wealth for Rushing Financial Group*

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Atlanta, Georgia | CRD#4843319

### 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.



## Brian G. Latinovich

*President and General Agent of Rushing Financial Group*

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### BUSINESS EXPERTISE

Executive Compensation Planning  
Advanced Estate Planning

Business Continuation Planning  
Financial Products Analysis & Design

Retirement Planning

### BIOGRAPHY

Brian graduated from Purdue University in 1985 with a B.S. in Business. He began his insurance career that same year as a Disability Income Specialist with Paul Revere.

Brian joined Rushing Financial Group in 1987 as a Brokerage Manager specializing in wealth transfer planning and business succession strategies. He is President of Rushing Financial Group as well as Board member and Partner of our national firm Capitas Financial.

Brian holds a Series 6 & 63, and is a Registered Investment Advisor. He is a current member of the National Association of Insurance & Financial Advisors, the Estate Planning Council, and the Society of Financial Service Professionals.

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