

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.

Washington D.C., Maryland, Delaware, West Virginia & Northern Virginia



Adam Betz, CFP®

Team Leader - Director of Private Wealth

BFA Wealth Partners – Capitas Financial, Inc.

Cell: 443-690-3311 | Fax: 301-220-2112 | adam.betz@capitasfinancial.com



Bill Betz, CLU®, ChFC®, CEPA

Partner/POS Support

Tel: 410-591-0660

Fax: 301-220-2122

bill.betz@capitasfinancial.com



William Tyson

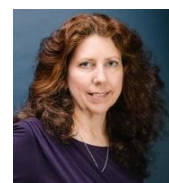
POS Support/Internal Account

Executive/Case Designer

Tel: 301-792-2284

Fax: 301-220-2122

william.tyson@capitasfinancial.com



Carrie Eichelberger

Case Manager

Tel: 301-220-2100

Fax: 301-220-2112

carrie.eichelberger@capitasfinancial.com

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



Adam Betz, CFP®

Director of Private Wealth for BFA Wealth Partners

Tel: 301-220-2100 | Fax: 301-220-2112 | Cell: 443-690-8311 | adam.betz@capitasfinancial.com
6406 Ivy Lane, Suite 220, Greenbelt, MD 20770 | CRD# 5149920

BUSINESS EXPERTISE

Advanced Estate Planning
Charitable Giving

Business Succession Planning
Private Placement VUL

Executive Benefits
Premium Finance

BIOGRAPHY

As Director of Private Wealth and a Certified Financial Planner™, Adam is nationally recognized as a subject matter expert in tax reduction planning catering to professional advisors and their high net worth entrepreneurial clientele. He brings creativity and imagination to deliver sophisticated, client tailored, tax-efficient estate and asset protection, business succession and charitable strategies. His partnerships include Wealth Managers, Private Banks, Wirehouses, RIA's/ Multi Family Offices, Property and Casualty Advisors and many of the nation's thought leaders in legal and tax planning.

Adam graduated from East Carolina University in 2007 with degrees in Marketing and Finance. Following graduation he began his career in wealth management with Morgan Stanley, formerly Citi Smith Barney in 2007. His tenure as an investment advisor during the "Great Recession" of 2008 created a unique perspective to his financial planning philosophy with an emphasis on risk management and tax efficiency across the balance sheet. In 2011 Adam decided to follow in his father's footsteps to join Betz Financial Advisory and has been recognized as a top-ranked specialist within Capitas Financial.

Adam Currently resides in Washington, DC with his wife, Laura, daughter, Isabel, and their French Bulldog, Gumbeaux.

BFA WEALTH PARTNERS

BFA Wealth Partners is an advisor-focused life insurance General Agency specializing in the design, underwriting, implementation, and ongoing service of life, disability, and long-term care insurance. We collaborate directly with financial institutions, wealth advisory firms, and private client advisors to deliver point-of-sale expertise and customized insurance solutions that integrate seamlessly into comprehensive financial plans.

Our consultative approach encompasses advanced planning, plan design, underwriting, and post-sale service. We work closely with trusted advisors in financial planning, risk management, tax, and legal planning to craft and implement life insurance strategies tailored for high-net-worth families and successful business owners. As a family-owned and operated firm, BFA Wealth Partners offers independent ownership with no preconceived agendas. Our team of seven experienced professionals brings intellectual capital and a client-centric process to every engagement, ensuring planning with a defined purpose and a reputation for caring.

Led by Managing Principal and General Agent Bill Betz, CLU®, ChFC®, and Managing Directors Adam Betz, CFP®, and Brian Betz, our team is committed to delivering sophisticated, unbiased solutions. We are proud to be a partner of Capitas Financial, servicing the brokerage needs of insurance and financial professionals in the Maryland, Washington, DC, and Virginia areas since 1970. For more information or to schedule a consultation, please visit our website at www.bfawealthpartners.com.

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.