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.

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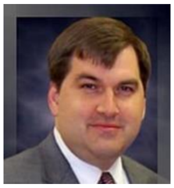

William Tyson

POS Support/Internal Account Executive/Case Designer

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Carrie Eichelberger

Case Manager

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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

Adam Betz, CFP®

Director of Private Wealth for BFA Wealth Partners
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6406 Ivy Lane, Suite 220, Greenbelt, MD 20770 | CRD# 5149920

BUSINESS EXPERTISE

Advanced Estate Planning	Business Succession Planning	Executive Benefits
Charitable Giving	Private Placement VUL	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 tenue as an investment advisor during the "Great Recession" of 2008 created a unique prospective 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.

Bill Betz, CLU®, ChFC®, CEPA

Managing Principal and General Agent for BFA Wealth Partners
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BUSINESS EXPERTISE

Advanced Estate Planning	Business Owner & Executive Compensation Planning	Charitable Giving
Private Placement VUL	Premium Financing	LTC / Chronic Illness Planning

BIOGRAPHY

As the Managing Principal, Bill is nationally recognized as a top-ranked specialist providing comprehensive estate and life insurance planning solutions for high net worth and ultra-high net worth clients of Banks; Wirehouse; Regional Broker Dealers; Financial Advisors; Portfolio Managers; Independent Financial Advisors, as well as Property & Casualty Firms throughout the Mid-Atlantic Region. He provides sophisticated, client-tailored, tax-efficient estate, asset protection, business succession and charitable planning strategies to the high-net-worth clientele of many highly regarded financial institutions in the United States.

As a Chartered Financial Consultant® and Chartered Life Underwriter® and Certified Exit Planning Advisor, Bill has over 40 years of high-end financial planning experience. His ability to cover the simple to the complex and explain in easy-to-follow terms, has been instrumental in developing long term relationships with trusted Advisors, while successfully implementing sophisticated strategies to protect personal and family wealth for closely held business owners; family offices and sports & entertainment Advisors, nationally.

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William Tyson

Director of Private Wealth of for BFA Wealth Partners

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6406 Ivy Lane, Suite 220, Greenbelt, MD 20770 | CRD# 2820186

BUSINESS EXPERTISE

Advanced Estate Planning
Retirement Planning

Executive Compensation Planning
Financial Products Analysis & Design

Business Continuation Planning

BIOGRAPHY

William joined Betz Financial Advisory, a partner firm of Capitas Financial, as a Director of Private Wealth in April 2019. He started in the life insurance business in June of 1996 with Prudential Preferred Financial Services where he served as an Agent for three years. In June of 1999, he joined Citibank where he spent nearly 20 years as Regional Insurance Specialist & Insurance Sales Manager. During his time at Citi he spent several years covering the Citi Smith Barney market in Philadelphia and bank channel in the Mid-Atlantic, Florida, Chicago and Texas regions. William specialized in Estate Planning and Wealth Transfer strategies. He has experience providing sophisticated strategies for high net worth families, executives, business owners and their professional advisors.

During his time at Citi he became a subject matter expert and featured speaker at hundreds of client seminars on the subject of Estate Planning, Long Term Care and Business Succession Planning. He also managed a team of Insurance Specialist at Citi for several years and worked closely with Bank Management to implement strategic focuses. William also became a specialist in foreign national estate planning and life insurance solutions in these circumstances.

Believing in service and giving back to the community, William and his wife, Christina, established a private school in Prince Georges County in 2010. William holds Series 7, 24, 63 & 65 securities licenses along with Life, Health & Variable licenses in many states.

William and his wife, Christina, are lifelong residents of Maryland with their three children: Kyle, Katie and Sean. In addition to spending time with family and friends, William and Christina have been on many cruises and enjoy traveling. They are also involved in their church and have been involved in many charitable organizations over the years.

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