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.

Texas & Louisiana

Christy Brown, CFP®, CLU®, MBA
Team Leader - Director of Private Wealth
Capitas Financial of Houston, Inc. – Capitas Financial, Inc.
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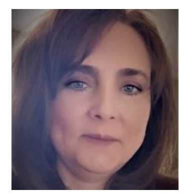

Jenny Duke
Case Manager
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Bank of America Private Bank | Merrill Private Wealth Management

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

Capitas Private Wealth Team

Christy Brown, CFP®, CLU®, MBA

Director of Private Wealth for Capitas Financial of Houston, Inc.
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4848 Loop Central Drive, Suite 1005, Houston, TX 77081 | CRD#5434132

BUSINESS EXPERTISE

Business Succession Planning
Tax Planning
Estate Planning
Risk Management

BIOGRAPHY

Christy joined Capitas in 2013, following seven years as a wealth advisor. As Director of Private Wealth, Christy works closely with financial advisors and their clients, seeking first to understand the clients' needs, then communicating even the most complex solutions in terms everyone can understand and feel comfortable with. Christy and her team understand the importance of the advisor-client relationship, and pride themselves on delivering a high level of service.

She is currently an instructor in Insurance and Risk Management for the Rice University Glasscock School of Continuing Studies CFP® Program, sits on the Board of Directors for the Houston Estate and Financial Forum (HEFF), and is a longtime member of the Houston Business and Estate Planning Council (HBEPC) and the Financial Planning Association (FPA). Christy is involved in her local community and supports The Houston Zoo, Fresh Arts, The Women's Home, and The Women's Resource of Greater Houston.

In addition to her industry designation of CERTIFIED FINANCIAL PLANNER™ and Chartered Life Underwriter®, Christy recently completed her MBA at Rice University where she was named a Jones Scholar for graduating in the top 10% of her class. She holds a B.S. in Business Administration and a B.A. in French. In her free time, she enjoys yoga, salsa dancing, traveling, camping and hiking.

CAPITAS FINANCIAL OF HOUSTON, INC.

Capitas Financial of Houston, Inc. was incorporated in 1997 as an insurance organization. We are a full-service marketing firm offering an array of tools to help financial professionals excel in their career.

We offer many advanced programs and services with a one-stop approach for an advisor's life, disability, and long-term care needs; fully understanding that a highly customized approach is required for the needs of today's High Net Worth Clients.

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.

Warren Prelle, JD

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BUSINESS EXPERTISE

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

BIOGRAPHY

Warren is the Brokerage Manager at Capitas Financial of Houston, Inc., a partner office of Capitas Financial Inc. He is committed to helping financial advisors achieve greater success by partnering with them to help their clients build, preserve and distribute wealth.

Warren specializes in advanced markets and through a collaborative and consultative approach, he can review, design, and implement life insurance strategies, and help identify clients who could benefit from life insurance. Warren's support can help advisors expand their business capabilities by offering sophisticated wealth transfer concepts including estate planning, charitable giving and business continuation solutions.

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