

*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.*

**Southern California, Nevada (Las Vegas), Utah, Arizona, Alaska & Hawaii**



**David Canaday, MSFS, ChFC®, CLU®, LUTCF®, AEP®, TEP**

**Team Leader - Director of Private Wealth**

Pacific Southwest Financial – Capitas Financial, Inc.

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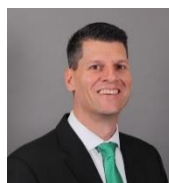
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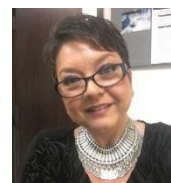
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**Bank of America Private Bank**

**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

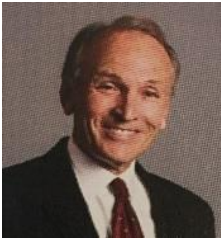
**Collaborating with the National Capitas Financial Private Wealth Centers**

Wealth Transfer &  
Estate Planning

Premium  
Finance

Business Planning /  
Succession

Executive  
Planning



## David Canaday, MSFS, ChFC®, CLU®, LUTCF®, AEP®, TEP

*Director of Private Wealth for Pacific Southwest Financial*

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### BUSINESS EXPERTISE

Estate Planning  
Retirement Planning

Charitable Planning  
Financial Products Analysis & Design

Business Planning

### BIOGRAPHY

David is a member of the Private Client Group and Director of Private Wealth for Pacific Southwest Financial / Capitas Financial. He and his group provide professional planning solutions, advice, and guidance for advisors and clients in the areas of Estate, Business, and Insurance Planning; helping clients protect and preserve family and business wealth.

His professional career spans 35+ years, including 9 years with Merrill Lynch as Regional Planning Specialist, followed by 24 years with Morgan Stanley Wealth Management as a Divisional Planning Specialist. He also served as the National Director, of the Estate and Insurance Planning Department in New York. David is now contracted and practicing with the Private Wealth Advisors from several Wall Street Firms, Trust Companies, and Legal / Accounting Firms.

David is an active member of the National Association of Estate Planners & Councils, the Orange Coast Estate Planning Council, the Society of Financial Service Professionals, and the Society of Trust and Estate Practitioners. He has authored numerous articles and lectured nationally on Protecting and Preserving Family & Business Wealth.

### PACIFIC SOUTHWEST FINANCIAL

Pacific Southwest Financial® is an independent financial services firm whose large professional service and support staff provides extensive resources for independent financial advisors and their clients. In addition, a number of national financial institutions, including stockbrokerage firms, insurance companies, banks and mortgage companies also rely on PSF® to provide technical, consulting and support services. The strength of PSF's commitment to quality is supported by our affiliation exclusively with financial professionals who adhere to the highest ethical standards.

As your strategic insurance partner, it is our objective to construct a comprehensive and coordinated plan that will result in converting information into action; to become an integral part of the life specialist group serving your organization; to deliver a benefit irrespective of whether or not a product is sold; and to contribute significantly to your insurance goals.

### 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.