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.

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

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Bank of America Private Bank | Merrill Private Wealth Management

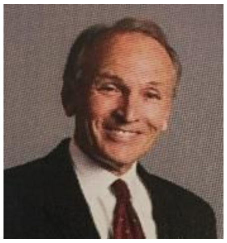
Supported by the Capitas Financial Team – Led By Local Director of Private Wealth

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

Value Beyond Insurance®



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BUSINESS EXPERTISE

Estate Planning	Charitable Planning	Business Planning
Retirement Planning	Financial Products Analysis & Design	

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.

Capitas Private Wealth Team

Bob Stankey, MBA

Director of Private Wealth for Pacific Southwest Financial

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BUSINESS EXPERTISE

Financial Planning	Special Needs Planning	Insurance
Retirement Planning	Estate Planning	Long Term Care

BIOGRAPHY

Bob joined Pacific Southwest Financial, a partner firm of Capitas Financial, as a Director of Private Wealth in February 2018. He is committed to helping financial advisors achieve greater success by partnering with them to help their clients build, preserve and distribute wealth. Bob has over 25 years of experience in the financial services industry, particularly with sales leadership and financial planning.

Bob holds an MBA in Finance from the University of Washington and in his spare time volunteers at the Union Gospel Mission Homeless Shelter and Recovery Center. He has lived over 20 years in Seattle with his family and enjoys playing golf, camping and traveling.

PACIFIC SOUTHWEST FINANCIAL

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