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.

New York – Long Island

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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 FINANCIAL
VALUE BEYOND INSURANCE

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BUSINESS EXPERTISE

Retirement Income Planning	Business Continuation Planning	Wealth Transfer Planning
Long-Term Care Solutions	Financial Products Analysis & Design	Estate Planning

BIOGRAPHY

Dave has 27 years of experience in the life insurance industry, having started in 1998 at The Hartford. His first life insurance sales role came in 2001 as an internal wholesaler working with Financial Advisors across all distribution channels. In 2005, he was promoted to Key Account Manager, responsible for managing broker/dealer relationships and sales in the independent channel. In 2010, Dave joined Pacific Life Insurance Company as a Key Account Manager in the life division and was quickly promoted to Senior Key Account Manager.

In 2014, Dave was promoted to Long-Term Care Regional Director for Pacific Life covering New England and New York. His focus was to assist Financial Advisors across all channels in better understanding the LTC/chronic illness market, products and how to assist their clients in choosing the right plan to address their concerns. In 2022, Dave joined The Smith Companies/Capitas Financial as Wealth Planning Consultant, now Director of Private Wealth, covering a variety of accounts in southern New England, Long Island, and northern New Jersey. In this role, he partners with Financial Advisors to help them implement customized planning strategies for their clients' various needs.

Dave and his family live in Suffield, CT. Having four children, he enjoys coaching several youth sports in the community. In his free time, he enjoys pickleball, woodworking, golf, fishing, traveling, and spending time at the beach with his family.

SMITH COMPANIES, LTD.

Smith Companies, Ltd. is the premier provider of life, long term care and disability insurance to financial service professionals, attorneys, accountants, bank trust officers and other advisors who provide their clients with advice regarding insurance needs as a part of their professional practice. We offer the professional financial advisor with "one stop" access to a broad spectrum of insurance products from the finest insurance carriers. We offer another advantage, which our competitors cannot match, a full range of "value added" support resources to assist in properly integrating the insurance product into the overall financial or estate plan.

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.