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.

Ohio (Excluding Southwest Corner)

Anthony DiSantis

Team Leader - Director of Private Wealth

NorthCoast Brokerage, Inc. – Capitas Financial, Inc.

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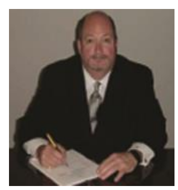

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Lenore Hradek

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

Anthony DiSantis

Director of Private Wealth for NorthCoast Brokerage Agency, Inc.
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BUSINESS EXPERTISE

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

BIOGRAPHY

Tony has been in the life insurance industry since 2005 and joined NorthCoast Brokerage in 2006 as an internal wholesaler. In 2008 he was promoted to Sales Vice President. Tony specializes in developing and executing sophisticated estate planning, business continuation planning, and wealth preservation strategies for High-Net Worth individuals and business owner clientele. Tony has an extensive knowledge of the various products and advanced estate and business planning concepts available in the marketplace today.

Originally from Erie, Pennsylvania, Tony is an Alumni of Cathedral Prep High school. A graduate of West Virginia University, Tony holds Bachelor's degrees in Economics and communications. In addition to his business commitments. In his spare time Tony enjoys spending time with his family, coaching his kids sports teams, playing golf, cooking, traveling, and wine. Tony is an avid sports fanatic for the West Virginia Mountaineers, Chicago Bears, Cleveland Indians, and the Cleveland Cavaliers. Tony, his wife Rosalia, and their 4 sons reside in North Royalton, OH.

Tony stands ready to assist you in all aspects of case design and analysis, as well as point-of-sale assistance.

NORTHCOAST BROKERAGE AGENCY, INC.

NorthCoast Brokerage is an independent brokerage general agency providing support services and point-of-sale assistance to our clients in the various financial services industries. We offer clear solutions to your client's complex problems with objectivity, independence, and a multiple carrier portfolio.

Our full service, one-stop approach, allows you to "partner" with an organization that is dedicated to your growth and success. We provide you with the tools and services necessary to maximize your opportunities today, while helping you build for tomorrow

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.