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.
Tel: 216-566-7400 | Fax: 216-566-9863 | tony.disantis@capitasfinancial.com

Damien Glennon, MSF, MSFP, ChFC®, CLU®
POS Support
Tel: 617-723-4800 ext. 1529
Fax: 617-367-6120
damien.glennon@capitasfinancial.com

Rick Schrage
Internal Account Executive
Tel: 248-281-1505
Fax: 216-566-9863
rick.schrage@capitasfinancial.com

Bill Davis
Partner/Case Designer
Tel: 216-566-7400
Fax: 216-566-9863
bill.davis@capitasfinancial.com

Lenore Hradek
Case Manager
Tel: 216-566-7400
Fax: 216-566-9863
lenore.hradek@capitasfinancial.com

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®

Anthony DiSantis

Director of Private Wealth for NorthCoast Brokerage Agency, Inc.

Toll Free: 800-443-0488 | Tel: 216-566-7400 | Fax: 216-566-9863 | Cell: 814-434-4030 | tony.disantis@capitasfinancial.com

1360 E. Ninth Street, IMG Center Suite 800, Cleveland, OH 44114 | CRD#5755086

BUSINESS EXPERTISE

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

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.

Damien Glennon, MSF, MSFP, ChFC®, CLU®

Director of Private Wealth for Smith Companies, Ltd.
Toll Free: 800-845-7707 | Tel: 617-723-4800 | Fax: 617-367-6120 | damien.glennon@capitasfinancial.com
225 Friend Street, Suite 600, Boston, MA 02114

BUSINESS EXPERTISE

Insurance Solutions	Business Continuation Planning	Wealth Transfer
Advanced Estate Planning	Financial Product Analysis & Design	Advanced Planning

BIOGRAPHY

Damien comes to Capitas with a technical background in finance, and has been working with the Smith Companies and Capitas Financial since 2002. Damien is a member of our advanced planning department which includes our estate planning attorneys, Paul Stevenson and Gary Lee.

Damien holds a M.S. degree in Finance as well as a M.S. in Financial Planning from the McCallum Graduate School of Business and a B.A. in Finance from Bentley College. Damien is a Chartered Financial Consultant® as well as Chartered Life Underwriter®, and is currently pursuing his CFP® designation. Damien resides with his wife Megan in North Andover, Massachusetts.

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.