

*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 Mexico



### **Richard W. Esterly**

**Team Leader - President & General Agent of Advanced Brokerage Services  
Internal Account Executive/Case Designer**

Advanced Brokerage Services – Capitas Financial, Inc.

Cell: 505-796-9601 | Fax: 505-292-5962 | [richard.esterly@capitasfinancial.com](mailto:richard.esterly@capitasfinancial.com)



### **May Marchese**

**Case Manager**

Tel: 505-292-3434 ext. 2009

Fax: 505-292-5962

[may.marchese@capitasfinancial.com](mailto:may.marchese@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



## Richard W. Esterly

*President & General Agent of Advanced Brokerage Services*

Cell: 505-796-9601 | Tel: 505-292-3434 | Fax: 505-292-5962 | richard.esterly@capitasfinancial.com  
4801 Lang NE, Suite 110, Albuquerque, NM 87109 | CRD#2108110

### BUSINESS EXPERTISE

Advanced Case Design

Financial Products Analysis & Design

Estate Planning

### BIOGRAPHY

Richard is an Albuquerque native and graduated with honors from Eastern Washington University with a Bachelor of Business Administration degree. His knowledge and experience in estate and business planning have been a valuable resource to our firm and brokers. Richard has over 25 years in the insurance brokerage business including significant experience in the international life insurance business with R.E. Lee International. He holds his series 6 and 63 insurance licenses.

Richard has served on the local Board of the National Association of Insurance and Financial Advisors in various capacities. Richard is available to assist you and your clients with advanced case design, implementation and product knowledge.

### ADVANCED BROKERAGE SERVICES

Advanced Brokerage Services, Inc. is a brokerage general agency in Albuquerque, New Mexico.

Advanced Brokerage Services provides insurance agents, investment professionals, banks and financial planners with a professional, one-stop approach to their life and disability needs.

Our life insurance portfolio includes term, universal life, whole and variable universal life.

### 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.