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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Team Leader - Director of Private Wealth
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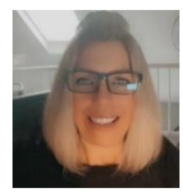

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Bank of America Private Bank | Merrill Private Wealth Management

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®

Jerry Galvin

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BUSINESS EXPERTISE

Capitas Business Insurance Specialist   Wealth & Asset Preservation Strategist   Distribution Specialist

BIOGRAPHY

Jerry has over 41 years of experience in the financial and insurance industries that began in 1981. From 1991 through 2004 he was a Senior Estate Planning and Business Insurance Specialist with two world class financial brokerage firms. His expertise has focused on tax efficient wealth accumulation, wealth preservation and tax efficient distribution strategies utilizing the unique advantages of the life insurance contract as a planning product. He specializes in delivering this professional and successful process to his client's best clients.

Jerry works with the nation's top NY Metro financial advisors, legal firms and accounting firms, helping support their Ultra-High Net Worth affluent clientele navigate their family wealth preservation and distribution process in tandem with their legal and tax council. Additionally, he has been a guest speaker and seminar facilitator for a number of regional estate planning councils and national financial brokerages.

Jerry graduated from Lafayette College in Easton, PA with a degree in Economics and Finance. Jerry is married with four children living on the North Shore of Long Island. In his spare time he enjoys skiing, sailing and golfing.

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.

Capitas Private Wealth Team

CAPITAS FINANCIAL
VALUE BEYOND INSURANCE

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

Director of Private Wealth for Smith Companies, Ltd.

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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.

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