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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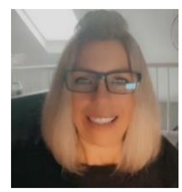

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Bank of America Private Bank | Merrill Private Wealth Management

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

Jerry Galvin

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225 Friend Street, Suite 600, Boston, MA 02114 | CRD#1033886

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.

David Corliss

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BUSINESS EXPERTISE

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

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BUSINESS EXPERTISE

Insurance Solutions
Advanced Estate Planning

Business Continuation Planning
Financial Product Analysis & Design

Wealth Transfer
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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