

*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.*

**Illinois, Minnesota, North Dakota, South Dakota, Iowa & Wisconsin**

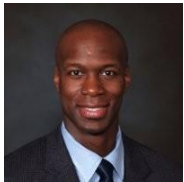


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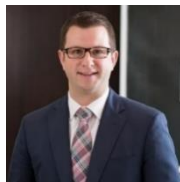
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**Bank of America Private Bank**

**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



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### BUSINESS EXPERTISE

Advanced Estate Planning  
Retirement Planning

Executive Compensation Planning  
Financial Products Analysis & Design

Business Continuation Planning

### BIOGRAPHY

A graduate of University of Washington in Seattle, George began his career with Manulife Financial as a Brokerage Manager. He later became the Regional Director of Brokerage for CIGNA Insurance Company before creating Capitas Financial of Illinois (formerly known as Chicago Brokerage Services) in the Chicago area. George is now the President and General Agent of Capitas Financial Midwest (Illinois & Wisconsin).

George has focused on advanced sales underwriting, providing sales support to producers and brokers who work primarily in the affluent marketplace.

George has served as a member of the Capitas Board of Directors, enjoys public speaking and working with financial planning professionals in the field to assist with the planning needs of their clientele.

### CAPITAS FINANCIAL MIDWEST, LLC

Capitas Financial Midwest is a complete service marketing organization, which offers a full range of carriers and planning expertise related to life insurance, disability income, annuities, long-term care and investment related products. Our firm supports other professional firms and practitioners who strive to meet the needs of their clients.

Capitas Financial Midwest, a founding partner of Capitas Financial, LLC, brings our customer the advantages of clout and the economy of scale that only this organization can offer. Experienced underwriting and advanced sales support gives our customers a distinct advantage in an increasingly competitive marketplace.

We understand and are committed to meeting the unique needs of successful producers.

### 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.