

# 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.*

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

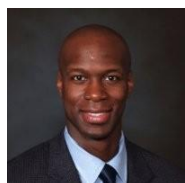


**George R. Gore Jr., CLU<sup>®</sup>, ChFC<sup>®</sup>, CFP<sup>®</sup>**

**Team Leader - President and General Agent at Capitas Financial Midwest, LLC**

Capitas Financial Midwest, LLC – Capitas Financial, Inc.

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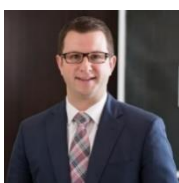
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**Bank of America Private Bank**

**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



## George R. Gore Jr., CLU®, ChFC®, CFP®

*President and General Agent of Capitas Financial Midwest, LLC*

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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.



## Jerry Hester, CLU®

*Director of Private Wealth of Capitas Financial Midwest, LLC*

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### BUSINESS EXPERTISE

Advanced Estate Planning  
Retirement Planning

Executive Compensation Planning  
Financial Products Analysis & Design

Business Continuation Planning

### BIOGRAPHY

Jerry W. Hester, II, focuses on creative risk management strategies that assist individuals, families and institutions to protect and build wealth efficiently. Jerry has developed a niche by utilizing Traditional and Private Placement Insurance structures with high net worth individual and institutional clients. Jerry is a qualifying member of one of the highly regarded associations in the life insurance industry --- the Million Dollar Round Table (MDRT) and a Chartered Life Underwriter® (CLU®).

Jerry is a Foundation member for the University of Illinois Foundation and a board member of University of Illinois College of LAS Alumni Association. He is a former member of the University of Illinois Alumni Association Board of Directors (UIAA) and also served as Midwest regional board member for Operation Hope.

He received his degree in Speech Communications from the University of Illinois at Urbana-Champaign in 1997. As a student, Jerry was a star basketball player earning All-Big Ten Honors, as well as a Big Ten Championship and Team MVP in 1998 as senior captain. After graduation, Jerry fulfilled his dream of being a professional athlete with a 6-year basketball career playing in Europe on teams from Poland, Israel, England and Serbia, visiting 24 different countries and learning to speak Polish.

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## Chris Moore

*Director of Private Wealth of Capitas Financial Midwest, LLC*

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### BUSINESS EXPERTISE

Advanced Estate Planning  
Leveraged Asset Transfer Solutions

Executive Compensation Planning  
Financial Products Analysis & Design

Business Succession Planning  
Tax Diversified Asset Growth Strategies

### BIOGRAPHY

Chris began his career after graduating from Saint Michaels College and continued his education obtaining a Masters in Business administration from OPUS COLLEGE OF BUSINESS, UNIVERSITY OF ST THOMAS. He started his career at Hartford and aided in training the best in the industry today. He continued to expand his role wholesaling and growing partnerships over a large territory.

In the early 2000s, Chris was brought on to UBS Financial Services as a Director of Insured Solutions Consultant. Chris has consistently excelled in his role as a life insurance point of sale support specialist at UBS. Placing a premium on excellence, he maintained a steadfast presence in the top 10 ranks within the UBS system, a testament to his commitment to delivering unparalleled service.

Chris's impact extends beyond individual success to encompass a broader enhancement of resources and tools within the UBS estate planning framework. Recognizing the importance of visibility, he actively worked to increase awareness and utilization of UBS estate planning resources and planning tools throughout the firm, contributing to a more informed and empowered clientele.

Chris has recently joined Capitas Financial as a Director of Private Wealth, working exclusively within the Midwest and Nation focusing on Financial Advisors with UBS and High Net Worth Clientele.

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