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.

Pennsylvania (Excluding Philadelphia Area)

Tom Hall, CLU®, ChFC®
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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®

Capitas Private Wealth Team

Tom Hall, CLU®, ChFC®

President and General Agent for Pittsburgh Brokerage Services, Inc.

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700 Washington Avenue, Carnegie, PA 15106 | CRD#706705

BUSINESS EXPERTISE

Advanced Estate Planning	Executive Compensation Planning	Business Continuation Planning
Retirement Planning	Financial Products Analysis & Design	

BIOGRAPHY

After graduating from the University of Pittsburgh, Tom entered the financial and insurance industries. In 1987, he founded Pittsburgh Brokerage Services, Inc. Drawing on 35 years' experience, he specializes in estate planning and has a long-standing reputation for making recommendations for yielding the best result for the client to maximize estate values. Tom is a long-time member of both the Pittsburgh Estate Planning Council and the Pittsburgh Life Underwriters Association.

PITTSBURGH BROKERAGE SERVICES, INC.

As a full service life insurance brokerage firm, Pittsburgh Brokerage assists insurance agents and financial advisors by offering products for Life, Long-Term Care, Disability, and Fixed Annuities. Their services include advanced marketing, case design, point-of-sale assistance, licensing, and expertise in impaired risk underwriting.

By providing objective planning alternatives and financially stable products, Pittsburgh Brokerage is able to present economical recommendations in an ever-changing insurance and financial marketplace, earning the respect of brokers, financial advisors, and their clients.

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.