Capitas Private Wealth Team

CAPITAS FINANCIAL
VALUE BEYOND INSURANCE

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.

Colorado, Nebraska & Wyoming

Michael Loden

Team Leader - Director of Private Wealth

Capitas Financial Midwest, LLC – Capitas Financial, Inc.

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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®

Michael Loden

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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

Mike began his career after graduating from Bradley University with a BS in Business Management and Finance and started working as an agent with Pacific Mutual. He built his practice working with small businesses and high net worth clients, while specializing in the areas of financial and estate planning, executive benefits and qualified retirement plans. During this time, Mike obtained both his Series 6 & 7 licenses.

In 1990, Mike formed B.L.U. Benefits Group Inc., specializing in health and welfare benefit planning and executive estate planning services. In 2001, Mike joined Gallagher Benefit Services, Inc., in the Benefits Consulting division of Arthur J. Gallagher & Co. Inc., as an Area Executive VP, responsible for managing the commercial sales team in the Chicago region. Mike joined BISYS Insurance Services in the fall of 2006 as Director of Sales in the Chicago office focusing on business development. In April of 2007, Mike was promoted to Regional VP, Sales, with the responsibility of leading the Chicago office. As the company transitioned to Crump Life Insurance Services in the late summer of 2007, his responsibilities grew to include leadership of the Chicago and St. Louis sales territories.

Mike joined Capitas Financial in April of 2010 as Senior Vice President, Director of Private Wealth, working exclusively within the Chicago region and focusing on Financial Advisors with Morgan Stanley Smith Barney. Since that time, Mike's territory has expanded to working with Morgan Stanley branches and advisors throughout the Midwest. Today, Mike offers his diverse knowledge and marketing experience in the areas of product design, advanced planning strategies and life underwriting as a valuable resource for all the Financial Advisors with whom he works.

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.