

*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.*

## Kentucky & Tennessee



**Kerry Pulliam, CFP®, AEP®, CEPA®**

**Team Leader - Director of Private Wealth**

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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



## Kerry Pulliam, CFP®, AEP®, CEPA®

*Director of Private Wealth for Gowers & Associates, Inc.*

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### BUSINESS EXPERTISE

Wealth Transfer  
Wealth Structuring

Business Succession  
Executive Compensation Plans

Charitable Giving

### BIOGRAPHY

As a Director of Private Wealth at Gowers & Associates, Kerry Pulliam is a nationally top-ranked specialist providing comprehensive estate and insurance planning solutions for high net worth clients of bank and wirehouse financial advisors, independent financial planners, and property and casualty firms in Kentucky and Tennessee. He provides sophisticated, client-tailored, tax-efficient estate, asset protection, business succession and charitable planning strategies to the high net worth clientele of many highly regarded financial institutions in the United States. His responsibilities include face-to-face meetings with clients and their financial advisors to assess planning needs and objectives, analyze supplied data and develop strategies for plan implementation through client-selected providers.

As a CERTIFIED FINANCIAL PLANNER™ with over twenty years of high-end financial planning experience, Mr. Pulliam has provided advanced technical support to some of the nation's top bank and wirehouse financial advisors, independent financial planners, and property and casualty insurance firms. His ability to cover the simple to the complex and to explain the complex simply has been instrumental in developing long term relationships with these advisors while also successfully implementing sophisticated strategies to protect personal and family wealth for some of the top business owners, family offices and sports/entertainment advisors globally. Mr. Pulliam is a frequent keynote speaker and has conducted numerous seminars and continuing education courses for clients, professional advisors and financial institutions. He has significant experience working with the sports and entertainment marketplace.

### GOWERS & ASSOCIATES, INC.

Gowers and Associates, Inc. provides life insurance agents, property and casualty agents, financial planners, licensed financial advisors, representatives of stock brokerage firms and banks with innovative marketing concepts and quality life, annuity, disability and long-term care insurance products.

### 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.