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.

Northern California & Nevada (Excluding Las Vegas)

Nichole Schurr, CFP®, CLU®, ChFC®, CASL®, CRPS®, AWMA®, MSFP
Team Leader - Director of Private Wealth
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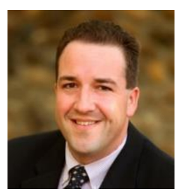

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Bank of America Private Bank | Merrill Private Wealth Management

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

Capitas Private Wealth Team

Nichole Schurr, CFP®, CLU®, ChFC®, CASL®, CRPS®, AWMA®, MSFP

Director of Private Wealth for Pacific Southwest Financial®

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2156 Granite Drive, Alamo, CA 94507 | CRD#1557049

BUSINESS EXPERTISE

Life Insurance Planning | Long Term Care Planning | Disability Income

BIOGRAPHY

Nichole joined Pacific Southwest Financial, a partner firm of Capitas Financial, as Director of Private Wealth in 2019. Prior to joining Capitas, Nichole was Regional Sales Vice President with Prudential Financial's Insurance division since 2016 and is currently the President of Schurr Financial Services, Inc. since 2001.

Nichole received her Bachelor of Science in Business Management from the University of Phoenix and Master of Science in Personal Financial Planning from the College of Financial Planning. She holds the following certifications: CFP®, CLU®, ChFC®, CASL®, CRPS®, and AWMA. When in her spare time, Nichole enjoys sailing and scuba diving.

PACIFIC SOUTHWEST FINANCIAL

Pacific Southwest Financial® is an independent financial services firm whose large professional service and support staff provides extensive resources for independent financial advisors and their clients. In addition, a number of national financial institutions, including stockbrokerage firms, insurance companies, banks and mortgage companies also rely on PSF® to provide technical, consulting and support services.

The strength of PSF's commitment to quality is supported by our affiliation exclusively with financial professionals who adhere to the highest ethical standards.

As your strategic insurance partner, it is our objective to construct a comprehensive and coordinated plan that will result in converting information into action; to become an integral part of the life specialist group serving your organization; to deliver a benefit irrespective of whether or not a product is sold; and to contribute significantly to your insurance goals.

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.