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.

Washington, Oregon, Idaho & Montana

Bob Stankey, MBA
Team Leader Director of Private Wealth
Pacific Southwest Financial – Capitas Financial, Inc.
Tel: 425-444-3928 | Fax: 818-264-2359 | bob.stankey@capitasfinancial.com

Kari Woods
Internal Account Executive
Tel: 818-702-0889 ext. 1137
Fax: 818-702-8850
kari.woods@capitasfinancial.com

Nate Thurbee
Case Designer
Tel: 818-702-0889 ext. 1109
Fax: 818-264-2359
nate.thurbee@capitasfinancial.com

Alex Yela
Case Manager
Tel: 818-702-0889 ext. 1124
Fax: 818-264-2359
alex.yela@capitasfinancial.com

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®

Bob Stankey, MBA

Director of Private Wealth for Pacific Southwest Financial
Office: 425-285-5185 I Cell: 425-444-3928 | Fax: 818-264-2359 | bob.stankey@capitasfinancial.com
5110 Carillion Point, Kirkland, WA 98033 | CRD#1264270

BUSINESS EXPERTISE

Financial Planning	Special Needs Planning	Insurance
Retirement Planning	Estate Planning	Long Term Care

BIOGRAPHY

Bob joined Pacific Southwest Financial, a partner firm of Capitas Financial, as a Director of Private Wealth in February 2018. He is committed to helping financial advisors achieve greater success by partnering with them to help their clients build, preserve and distribute wealth. Bob has over 25 years of experience in the financial services industry, particularly with sales leadership and financial planning.

Bob holds an MBA in Finance from the University of Washington and in his spare time volunteers at the Union Gospel Mission Homeless Shelter and Recovery Center. He has lived over 20 years in Seattle with his family and enjoys playing golf, camping and traveling.

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.

Securities offered through: The Leaders Group, Inc. member FINRA / SIPC 26 W. Dry Creek Circle, Ste. 800 Littleton, CO 80120 (303) 797-9080.