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.

Michigan

Michael Tepper

Team Leader - Director of Private Wealth

Smith Companies, Ltd. – Capitas Financial, Inc.

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POS Support

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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

Michael Tepper

Director of Private Wealth for Smith Companies, Ltd.

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BUSINESS EXPERTISE

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

BIOGRAPHY

Michael has been a successful part of Capitas since joining the organization in January 2004. He has been instrumental in the success of our institutional accounts market locally and is one of our most distinguished Directors. He has been nationally recognized for his many achievements in insurance planning.

His primary focus is to be an extension of an advisor's team to assist in insurance planning when in the client's best interest. His focus on developing relationships, training, and identifying planning opportunities has been paramount to his success and the success of the advisors he serves.

Along with his 25+ years' experience in the insurance industry, Michael is a graduate of the Culinary Institute of America and the coveted Greenbriar apprenticeship program. He holds a Series 6, 63, and 26 licenses. He enjoys cooking, traveling, golf, wine collecting and reading.

SMITH COMPANIES, LTD.

Smith Companies, Ltd. is the premier provider of life, long term care and disability insurance to financial service professionals, attorneys, accountants, bank trust officers and other advisors who provide their clients with advice regarding insurance needs as a part of their professional practice. We offer the professional financial advisor with "one stop" access to a broad spectrum of insurance products from the finest insurance carriers. We offer another advantage, which our competitors cannot match, a full range of "value added" support resources to assist in properly integrating the insurance product into the overall financial or estate plan.

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.