



Your Financial Planning Partner

I specialize in helping high-net-worth individuals strengthen their financial plans by strategically using life insurance and annuities. These products, along with disability and long-term care, are not often addressed until it is too late.

I have over 40 years of experience in this field and own an insurance agency in Louisiana, and am licensed in multiple states.

How I Support My Clients

Guaranteed Income Strategies

I help clients create predictable lifetime income streams that complement investment portfolios and reduce long-term financial risk.

Tax-Efficient Planning

Annuities and certain life insurance solutions can provide tax-deferred growth and reduce taxable exposure for high earners.

Market Volatility Protection

Clients can safeguard a portion of their wealth from volatile markets while still achieving steady, reliable growth.

Estate and Legacy Planning

Life and annuity products can efficiently transfer wealth to beneficiaries, provide liquidity, and reduce family financial stress.

Holistic Risk Management

I evaluate gaps in existing financial plans and recommend solutions that support long term financial security.

Types of Clients I Serve

- High-income earners
- Affluent families and retirees
- Business owners and executives
- Clients concerned about taxes, volatility, or retirement income
- Individuals preparing for wealth transfer or succession planning



My Commitment

I strive to be a reliable resource that enhances the quality of service you deliver to your clients. When your clients collaborate with me, they benefit from professional guidance aimed at supporting and enriching the work you already provide.



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