



Your Financial Planning Partner

I specialize in helping high-net-worth individuals strengthen their financial plans through the strategic use of life insurance and annuities. My role is to support the work you already do by providing specialized guidance on asset protection, tax-efficient planning, and guaranteed income solutions.

I have over 40 years of experience in this field, owning an insurance agency in Louisiana.

How I Support Your 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 To You

I aim to be a trusted resource that elevates the level of service you provide to your clients. When your clients work with me, they receive professional guidance designed to reinforce and enhance the work you already do.



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