

Seminar is presented by:

Robbie Spivey, CLU, ChFC, CWS®
Financial Direction Group

Captive Insurance Companies: Design & Business Uses

- ❖ What is a Captive Insurance Company and how does it work?
- ❖ Full Captive – how does this work and what solutions can they provide?
- ❖ Unitized Captive – how does this work and what solutions can they provide?
- ❖ How do I implement this program?

Robert F. Spivey, Jr., CLU, ChFC, CWS®, CExP™

- ❖ Founded Financial Directions in 1989
- ❖ Over 30 years experience in insurance and financial services industry
- ❖ Focuses on innovative wealth preservation/enhancement techniques
- ❖ Certified Estate Planning Professional
- ❖ Certified Wealth Strategist
- ❖ BEI Certified Exit Planner (CExP™)
- ❖ Holds Series 7, 24, 63 & 65 securities licenses
- ❖ Registered Principal and Investment Advisor Representative with First Allied Securities, Inc
- ❖ Actively involved with the Boy Scouts of America on a regional and national level