

# Jeffrey A. Orr, J.D.

## Managing Principal Highland Capital Brokerage-Northwest

1601 Fifth Avenue  
Suite 1800  
Seattle, WA 98101

**Email:** [jorr@highland.com](mailto:jorr@highland.com)  
**Phone:** 206.802.2628



Jeffrey A. Orr, J.D., serves as Managing Principal for Highland Capital Brokerage Northwest. With 20 years of experience in the financial services industry, Jeff is focused on building and maintaining HCB's business as well as coaching and leading the HCB Northwest Sales Vice Presidents. He supports the SVPs in their efforts to provide expertise, consultation, and targeted insurance strategies to the agents, advisors, and clients in the company's distribution channels.

Jeff is a business and estate-planning attorney by background, having practiced in California, Utah, and Washington, D.C. Prior to joining Highland Capital Brokerage, Jeff served as Senior Vice President of Distribution for Millennium Brokerage Group Institutional where he managed point of sale professionals, expanded the institutional group, and was responsible

for all financial institution disability and life sales, including compliance oversight, marketing coordination, profit and loss management, and carrier and financial institution relationship management. Jeff held the position of Senior Specialist at TIME Financial prior to his position at Millennium. In his role at TIME Financial, Jeff was a leading point of sale life insurance producer working with financial advisors at top tier financial institutions and Wall Street firms providing planning-related insurance products to their clients. Jeff was Vice President of Estate and Financial Planning at LPL prior to his position at TIME where he managed a team of specialists who assisted advisors and their clients with the design and implementation of planning strategies and the associated insurance and annuity products.

In addition to his J.D., Jeff is insurance licensed in many states and holds his Series 63 and Series 7 Securities Licenses.

Jeff believes everyone is unique and has his or her own personal story. For Jeff, the key to being a consummate professional is really getting to know people and understanding that "story." By getting to know people well, Jeff can work with them and their other advisors to create customized plans tailored to their unique circumstances, needs, values, and vision.

Jeff and his husband Wayne live in Seattle. They love spending time with their family, especially their grandchild. While challenged to keep up with the children, Jeff is nonetheless an avid snowboarder, hiker, and a biker. Jeff is an amateur chef and oenophile and loves nothing more than to spend an evening around the table with friends and family enjoying delicious food, excellent wine, and interesting conversation. Jeff brings that same comfort and warmth to the very personal work he does in his professional life.

### ABOUT HIGHLAND CAPITAL BROKERAGE

Highland Capital Brokerage is committed to partnering with financial advisors and insurance professionals using our core competencies of life insurance, annuities, and long-term care. We distinguish ourselves by providing point-of-sale support, advanced marketing, and creative estate and business planning techniques. We provide these services in an efficient, client-focused environment that extends to carrier and product expertise, underwriting negotiation, and complete back office processing. For more information, visit [www.highlandbrokerage.com](http://www.highlandbrokerage.com).

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Revised 7/6/16 | HCB00048



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