

Lisa Fleming

Sales Vice President

Highland Capital Brokerage–Southeast

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Lisa Fleming serves as Sales Vice President for the Highland Capital Brokerage–Atlanta office. She is a no-pressure resource with over 28 years of experience with creative uses of life insurance for individuals and small business owners.

Lisa's primary responsibility is to add value to advisor's client relationship. She assists advisors with their clients' insurance, estate planning, wealth transfer and business succession. She helps advisors identify financial concerns for their clients and propose solutions. She works closely with the financial advisors, attorneys, CPAs and TPAs to present the best team approach to fit the clients' needs. By positioning Lisa as the "expert", the financial consultant retains the ability to advise his or her client

on the merits of the recommendation. This team approach has been successfully received by the client and the client's advisors, such as the client's financial advisor, tax attorney and CPA. Lisa specializes in case design, client presentation, and thorough review of all documents to completion. Lisa's goal is to make life insurance easy — from the initial client/advisor meeting, all the way through to the case delivery and commissions.

A licensed agent since 1988, Lisa worked as a Brokerage Associate with Brokers Clearing House, Inc., prior to joining Highland Capital Brokerage. She was nominated as the "Select Insurance Associate" with A.G. Edwards & Sons, Inc. Lisa has been in the life insurance business working with financial advisors for the past 26 years of her 28 year life insurance career.

Lisa is a hard worker and dedicated to her family and clients. She is enthusiastic and family oriented. She has two children. She loves working with people and is actively involved in the Boy Scouts of America. She has a son that earned his Eagle Scout Rank. Other areas of interest are outdoor activities including gardening, rock climbing, SCUBA diving and swimming, boating, camping and canoeing.

Lisa holds the Life, Health and Variable Annuity license and the following FINRA license: Series 6: FINRA Investment Company Products and Variable Contracts Limited Representative.

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.

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