

# Simon J. Owen, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>

*Vice President*

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Simon J. Owen, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, serves as a Vice President for Highland Capital Brokerage-West in Los Angeles.

With over 20 years of financial services experience, Simon specializes in connecting generations through wealth preservation and transfer. His expertise includes providing sophisticated strategies for high net worth families, executives, business owners, and their professional advisors in the areas of wealth preservation and transfer, long term care, and disability planning, as well as business continuation and transfer funding.

Prior to joining HCB, Simon was at Bank of America Merrill Lynch for 10 years. Most recently, he was an Insurance Specialist (First Vice President-Investments) within the Wealth Structuring Group responsible for point-of-sale and product knowledge expertise for financial advisors and their clients in the Greater Los Angeles area. Prior, he was a Financial Advisor within the Private Banking and Investment Group at Merrill Lynch.

Simon holds the following designations: Certified Financial Planner<sup>®</sup> (CFP<sup>®</sup>), Certified Life Underwriter<sup>®</sup> (CLU<sup>®</sup>), and Chartered Financial Consultant<sup>®</sup> (ChFC<sup>®</sup>). He is a Chartered Accountant, Member of the Institute of Chartered Accountants in England and Wales, and holds the the FINRA Series Series 7 (General Securities Representative), Series 65 (Uniform Investment Adviser Law Examination) and Series 66 (Uniform Combined State Law Examination). Simon received a BSc (first-class joint honors) in Chemistry and Food Science from the University of Reading, United Kingdom.

## 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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