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Simon J. Owen, CFP[®], CLU[®], ChFC[®], serves as a Vice President for Highland Capital Brokerage - West in Los Angeles.

With over 20 years of financial services experience, Simon draws upon his accounting and wealth planning knowledge to design and implement sophisticated insurance strategies to meet the tailored needs of high net worth families, executives and business owners. Simon's clients include institutional and independent advisors, as well as Property and Casualty agencies, CPA's, attorneys and trust companies.

Prior to joining HCB, Simon was with Bank of America Merrill Lynch for 10 years, initially as a Financial Advisor within the Private Banking and Investment Group before becoming the Insurance Specialist responsible for subject matter expertise and point-of-sale support of life insurance, long-term care and disability income products for Financial Advisors and their clients in the Greater Los Angeles.

Simon holds the following designations: Certified Financial Planner[®] (CFP[®]), Certified Life Underwriter[®] (CLU[®]), and Chartered Financial Consultant[®] (ChFC[®]). He is a Chartered Accountant, Member of the Institute of Chartered Accountants in England and Wales, and holds the FINRA Series 7, Series 65 and Series 66 licenses.

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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