

Thomas R. Pate, CLU®

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Thomas R. Pate, CLU®, serves as Vice President Sales for the Highland Capital Brokerage–Southeast office. With more than 44 years of insurance and financial planning experience, he is responsible for assisting independent financial and institutional advisors grow their business with mass affluent clients. Providing local, personalized service, he is committed to providing his clients customized insurance solutions in the areas of life insurance, annuities, disability, and long term care, enabling advisors to select the best solution for their clients' needs.

Prior to joining Highland Capital Brokerage, Thomas served as a Regional Estate Planning Consultant and Financial Advisor for Morgan Stanley, where he was responsible for assisting advisors in identifying high net-worth estate planning prospects. Focusing on education for both the advisor and the client, he conducted client seminars and estate planning idea sessions for advisors. His industry experience is vast and includes serving as Divisional Sales Manager for Protective Life Insurance Company, District Annuity Specialist for Merrill Lynch Life Agency and Estate Planning and Business Insurance Specialist, and serving as a Life Specialist for EF Hutton.

Thomas has earned his Chartered Life Underwriter® (CLU®) designation and is a member of the American Society of Financial Service Professionals, the National Association of Insurance and Financial Advisors, and the Golden Key Society. In addition, he has qualified for the Court of the Table, Top of the Table, and as a life member for the Million Dollar Round Table. He is also a guest faculty member for the Insurance Marketing Institute at Louisiana State University.

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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