

Eric Stein

Vice President

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Eric Stein serves as Vice President for Highland Capital Brokerage – New York Metro. He has 23 years of experience in the financial services industry building strong relationships with financial professionals and providing customized insurance solutions for their clients. Eric specializes in wealth transfer planning, business succession planning, employee retention, personal needs planning, deferred compensation, as well as charitable gifting strategies. He is an award-winning financial services veteran who is respected industrywide.

Prior to joining Highland, Eric was a Point-of-Sale Specialist, Wealth Management Advisor with Gerstein Fisher. There he provided strategies to financial professionals for their high net worth clients. Prior to that, Eric held several advisor roles in the industry. He was an Asset Management Advisor with Gerstein Fisher, the Director of Life Insurance Planning with Frenkel Benefits, and a Wealth Management Advisor with AXA Equitable and Guardian Life. In each of these roles, he excelled in personal production and was instrumental in building the life insurance departments of the companies.

Eric is a Million Dollar Roundtable qualifier and the 2001 winner of the prestigious New Agent of the Year award from Strategies for Wealth Creation, an agency of Guardian Life Insurance Company. He graduated from the University at Buffalo where he was a member of Alpha Epsilon Pi. Eric holds a Series 7 (General Securities Representative), a Series 63 (Uniform Securities Agent State Law), and a Life and Health license.

When Eric is not working or caring for his two sons, he spends his time surfing new locations around the world, playing golf, and staying fit.

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.

Eric Stein is Securities Licensed Through Investacorp, Inc.
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