

Robert Finnegan, J.D., CLU[®], AEP[®]

Senior Vice President, Advanced Planning Attorney
Highland Capital Brokerage

Email: bfinnegan@highland.com Cell: 518.424.8928 Fax: 860.470.0201



Robert W. Finnegan, J.D., CLU[®], AEP[®], serves as Senior Vice President, Advanced Planning Attorney at Highland Capital Brokerage. He is responsible for providing advanced sales support across the company, supporting distribution in all channels and working with principals, sales vice presidents, independent producers, and financial institutions to develop business opportunities and enhanced advanced marketing solutions for clients.

The majority of Mr. Finnegan's 30+ year career as an estate planning attorney has been devoted to protecting and transferring wealth for ultra-high net worth individual and business clients. Prior to joining Highland, he held the position of Executive Vice President, Advanced Planning at Heritage Strategies LLC, in Woodbury, New York, providing

technical and product design support in the business, estate, charitable, and executive planning markets. Prior to joining Heritage Strategies, Mr. Finnegan was a founding member of Premier Planning Associates, LLC, in Saratoga Springs, New York. He also served as President of Sage Consulting & Wealth Preservation.

Mr. Finnegan's expertise includes business, estate, charitable and life insurance planning. His successful approach to planning combines strong legal skills, extensive insurance expertise, and excellent communication skills. Mr. Finnegan employs a full range of sophisticated planning strategies to provide each client with custom results based planning to meet their objectives.

He has been published in several highly regarded national newsletters, journals, and trade magazines including *Leimberg Information Services, Inc., (LISI) Estate Planning Newsletter*, the *National Association of Estate Planners & Councils (NAEPC) Journal of Estate & Tax Planning*, *Estate Planning* magazine, *Probate & Property* magazine, and the *Journal of the American Society of CLU & ChFC*. In addition, Mr. Finnegan is serving on the *Insurance Committee of Trust & Estate* magazine. He has spoken at industry conferences, such as the Forum 400 National Meeting, the Association of Advanced Life Underwriters (AALU) National Meeting, M Financial Group meetings, and at other industry events.

Mr. Finnegan is a graduate with honors of the University of Connecticut School of Law (1990), and was awarded a Bachelor of Arts degree in Mathematics, magna cum laude from Boston University (1977). Mr. Finnegan is a member of the Society of Financial Service Professionals (CLU[®]), holds the Accredited Estate Planner (AEP) designation and, although a non-practicing attorney, the Connecticut Bar Association.

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.

