

David Lyles

Vice President

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David Lyles serves as a Vice President for Highland Capital Brokerage-Southwest. With more than 19 years of experience in the financial services industry, David specializes in connecting generations through wealth preservation and transfer. He provides sophisticated strategies for high net worth families, executives, business owners, and their professional advisors in the following areas:

- *Wealth preservation and transfer* - this includes the use of insurance funding in estate plans and charitable giving.
- *Business plan funding* - this includes buy/sell agreements, business succession planning, and executive benefits/compensation arrangements.
- *Survivor protection needs* - this includes life insurance, disability insurance, and long term care solutions.

Prior to joining Highland, David worked as a Vice President for Global Wealth & Retirement Solutions at Merrill Lynch since 1997. There, he provided Financial Advisors and their clients, as well the clients' legal and tax advisors, with leading edge education, presentations, and product recommendations for life insurance solutions in the areas of estate planning, business succession planning, and survivor protection.

His interaction with a wide variety of clients and advisors, as well as a vast array of client situations, has given David a deep understanding and wealth of experience to help navigate the often-complex world of life insurance planning.

David holds a Series 7 (General Securities Representative), a Series 63 (Uniform Securities Agent State Law), and a Series 65 (Uniform Investment Adviser Law) securities license. In addition, he has insurance licenses for multiple states.

David resides in the Tulsa, Oklahoma area with his wife of 18 years and their five children. David and his wife are very involved in the community. They volunteer their time at church, coach various sports, and mentor young professionals.

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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