



Brian O'Connor

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Background & Experience

Brian helps clients review their existing life insurance to compare it to current market pricing and facilitates the acquisition of new coverage that may be needed. Brian is skilled at educating clients and their advisors on the economics and risks associated with various types of life insurance products and guiding them through the decision-making process to construct a portfolio that is tailored to their particular estate plan. Brian has been in his current role over 8 years. Previously, he spent three years at Greenwich Capital in their Corporate Client Group.

Brian is a graduate of Binghamton University, earning a degree in Philosophy, Politics, and Law. At Binghamton, Brian was a four-year letter winner for the tennis team. Brian is a committee member for New York Junior Tennis & Learning (NYJTL), and Joe Torre's Safe at Home Foundation. He lives in Mamaroneck, New York, with his wife, Beth, and their two sons, Carter and Brodie. Brian enjoys playing tennis, platform tennis and golf. Brian holds a FINRA Series 7 and 63.

Certifications & Education

- Binghamton University, Binghamton, NY - Philosophy, Politics and Law