



Douglas Dunne

MERITAGE Wealth Insurance Advisors

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Background & Experience

Doug is a founding partner of MERITAGE Wealth Insurance Advisors. He focuses on protection planning, wealth accumulation, supplemental income planning, and wealth transfer strategies specifically for high income and high net worth clients. Working with your Financial Advisor or wealth management team, he develops strategies that are designed to be in harmony with your overall financial, estate, and business succession goals to help protect and preserve your assets for the next generation.

Doug has more than 20 years of experience in the insurance industry. He has been the Insurance Specialist/Expert at Smith Barney, Morgan Stanley, and Wells Fargo. His extensive knowledge of advanced life insurance strategies and their applications allows him to work closely with your financial team, including attorneys and accountants, to execute the program best suited to meet your objectives.

Doug recognizes that each comprehensive plan requires an individualized approach and unique strategies. His focus is to bring you creative, personalized financial strategies that take advantage of how life insurance can function as a premier wealth transfer, wealth accumulation, protection, or estate planning vehicle.

Doug covers the New York City, Long Island, Westchester, Hudson Valley, and Connecticut (Greenwich) regions.