

Michael Levin, CLU, ChFC

BKA Financial
5835 Bayou Grande Boulevard Northeast
Saint Petersburg, FL 33703
Email: mlevin@bkafinancial.com
Phone: 727-374-6248
Cell: 727-270-4723

Michael has a successful 34-year track record as an estate, wealth and business insurance specialist working with high net worth clients and their other advisors to establish, fund and leverage multi-generational planning and philanthropic strategies. He has a proven 23-year background as a consistently top-ranked wirehouse specialist with proven skills in advanced planning techniques, affluent sales and marketing strategies, regional territory management and market development. Well regarded by advisors and clients for an ability to clearly communicate complicated planning strategies and connect generations of families through wealth preservation and transfer.

Previously, Michael worked at Merrill Lynch as a First Vice President, Wealth Planning and Business Insurance Specialist, where he supported financial advisors in Pennsylvania, New York, Maryland, Alabama, Mississippi, Louisiana and Florida. He also worked with Aetna Life and Casualty as a Regional Life Insurance and Estate Planning Specialist supporting more than 300 property and casualty agencies in Pennsylvania. Michael is a Life Member of the Million Dollar Round Table and MDRT Top of the Table. He has a FINRA 7, 6, 63 and 65 as well as his Life and Health Licenses.

EDUCATION

- Indiana University of Pennsylvania
Bachelor of Science, 1982
- Charter Life Underwriter, 1987
- The American College, Bryn Mawr, PA
Chartered Financial Consultant, 1988