



Bill A. Meredith

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Bill Meredith has over 25 years of experience in the life and wealth management insurance industry. Bill is an expert in advanced sales life insurance concepts and solutions. He has extensive experience in wealth transfer and executive benefits. He is well versed on a variety of products including life insurance, long-term care and disability insurance. Bill has a proven ability to develop solid relationships with financial advisors. He understands and respects the relationship between a financial advisor and the client and positions himself as a consultant, helping to simplify the process of protecting and when the time is right, transferring wealth. Prior to joining PLAN and working in the General Agency realm, Bill held various sales roles with ING, AIG, and Principal.

In addition to having a Life and Health License, Bill also holds a FINRA Series 6 & 63.

EDUCATION

- University of South Carolina – Coastal Carolina, Conway, SC
B.S., Business