



**Shawn Bragdon, CLU®, ChFC®**

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**Background & Experience**

Shawn Bragdon is a President and founder of BGA Direct Insurance Services and managing partner of BGA Insurance Services. With over 25 years' experience in estate planning, taxation and investments, he is an excellent resource for helping identify and solve complex issues associated with a client's financial needs. His areas of expertise include wealth preservation and transfer, wealth accumulation, business planning and asset protection. Prior to BGA, Shawn was the Regional Vice President for Lincoln Financial Group and Jefferson Pilot Financial managing the Western United States for both companies.

Shawn is a frequent industry speaker on a variety of advanced planning techniques and published author with his award-winning article on the "Taxation of Retirement Plans". Shawn holds life and health licenses in multiple states and Series 7, 65 and 63 registrations. He is a member of the Society of Financial Service Professionals, National Assoc. of Insurance & Fin. Advisors (NAIFA), Orange County Estate Planning Council and Million Dollar Round Table (Top of the Table 2011).

**Certifications & Education**

- Fort Lewis College, Durango CO – B.A.
- The American College, Bryn Mawr, PA – Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU)