



**Rick Stein, CLU<sup>®</sup>, ChFC<sup>®</sup>**

MERitAGE Wealth Insurance Advisors

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Rick is a founding partner of MERitAGE Wealth Insurance Advisors. He has over 30 years of experience working with clients to structure and incorporate insurance as an integral component of their comprehensive wealth plan. His expertise in implementing insurance strategies has helped hundreds of clients to grow and protect their assets as part of their overall wealth transfer and legacy goals.

Mr. Stein specializes in Estate Planning, Supplemental Income strategies, and Business Succession Planning. As the Wells Fargo Wealth Insurance Specialist in the Southwest market, Rick spent the past five years working primarily with clients of both Wells Fargo Advisors and Wells Fargo Private Bank to help them achieve their financial goals. During the previous 17 years, he provided consulting services as part of The Hartford and then Prudential, working with financial institutions in the Arizona markets. He began his career in Minneapolis where he worked his way up to Regional Vice President of the North Central Region for Chubb Insurance Company.

Rick, his wife, and their two children live in Scottsdale, AZ where he enjoys attending his children's activities. He also enjoys working out, an occasional round of golf when time allows, and following his beloved Minnesota Vikings football team.

**EDUCATION**

- Winona State University, Winona, MN  
B.S. Business Education and Accounting
- The American College, Bryn Mawr, PA  
Chartered Life Underwriter and Chartered Financial Consultant