



Joyce A. Theis, CLU, ChFC

VIP Insurance

San Antonio / Valley Region - TEXAS

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Working directly with money managers, advisors, foreign national specialists, P&C firms, accounting, and legal professionals, Joyce can assist in bringing personal, business & estate planning strategies from concept to closure. With the ability to provide insurance solutions which are carrier- and product- neutral, a benefit to you and your agency is an objective analysis of the current marketplace, along with the on-call technical expertise needed to deliver optimum credible choices to your clients. The ultimate goal is greater client retention, alongside higher life, disability and LTC revenue for your firm. When appropriate, a team approach is utilized, bringing in other professionals for a holistic view. Joyce has helped develop and close both simple and complex wealth transfer cases, as well as guided the implementation of important plans for business owners. She believes constant education and communication are vital and is available for point-of-sale, group workshops, CE-credit courses, and client seminars.

Joyce began her career in 1987 in the northwest working with financial institutions, bringing the insurance solutions of a major insurance carrier to front-line representatives. In 1992, she joined a captive insurance agency, eventually branching out into an independent platform, running her own retail insurance and securities practice for many years. In 2005, Joyce and her family moved to San Antonio, TX, where she eventually joined VIP Insurance. Joyce holds a General Insurance license, as well as both the General Securities (Series 7) and Investment Advisor Representative (Series 66) registrations.

EDUCATION

- College of St. Benedict / St. John's University, St. Joseph, MN
B.A. German & B.S. Management Administration, 1987
- American College, Bryn Mawr, PA
Chartered Life Underwriter / Chartered Financial Consultant, 1997