



**Tom Bartley**

FSG-Financial Strategies Group, LLP

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**Background & Experience**

Tom Bartley is a Partner and Estate Planning Consultant with FSG. Prior to joining FSG, he served as Sales Vice President for Highland Capital Brokerage-Northwest where he was primarily responsible for their top institutional and wirehouse accounts.

Through a collaborative and consultative approach, Tom can review, design, and implement life insurance strategies. Tom's support can help advisors expand their business capabilities by offering sophisticated wealth transfer concepts including estate planning, charitable giving, and business continuation solutions.

Tom currently has been in the life insurance industry for over 40 years. Prior to Highland, Tom worked as a Life Insurance Specialist with Capital, Smith Barney, Merrill Lynch, and Shearson American Express.

Tom currently hold the following FINRA licenses: Series 7; Series 63; and Series 66

**Certifications & Education**

- Advanced Estate Planning II Certification – The American College
- Oregon State University - Corvallis, OR  
Bachelor of Arts, Finance, 1976