

DICK WHITE

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PROFESSIONAL PROFILE

Dick White has over 30 years of experience in the financial services industry. Dick began his Life Brokerage career in 1992 and brings to you a high level of expertise in Advanced Markets case design, specializing in Estate and Business Planning for the Affluent Client.

Prior to joining PLAN/Trumark Insurance Services in July of 2012, Dick was a Brokerage Manager/Consultant for the Blair Agency (a partner of the R. E. Lee Group), Insurance Designers, and Mercury Financial Group, where he worked closely with Financial Advisors and their clients in the areas of estate and business planning. Dick is very comfortable in "Point of Sale" meetings with clients and their other advisors, or providing "Backroom Technician" expertise. After college, Dick spent seven years in the San Francisco Giants baseball organization before joining the Equitable Life Assurance Society in 1980 as a life insurance agent, and then after his first year in personal production was promoted to District Sales Manager. Dick's interest in providing comprehensive financial planning to his clientele led him to positions with Paine Webber, CIGNA Financial Services, Coordinated Planning Services, and ultimately to being President of White Planning Services.

In his spare time, Dick enjoys being with his family, playing golf with his two sons and a few close friends, and working on woodworking projects in his workshop.