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Nancy Woo
Director Life Marketing



Nancy has a Bachelor of Arts Degree in Business Economics and a Minor Degree in Chinese from the University of California, Santa Barbara.

Prior to joining Westland Financial Services in 2003, she was a Senior Internal Sales Specialist with Manulife Wood Logan in Santa Barbara wholesaling Variable Annuities.

Nancy entered the financial services industry with American Express Financial Advisors in 1999 and was quickly promoted to a senior position as a Para Planner and worked for three years creating and presenting financial plans.

Nancy is our Life Insurance expert having focused her efforts these last 14 years supporting Financial Planners and Wealth Managers with insurance strategies as part of well-rounded financial portfolio.

She enjoys being that “Go To” resource for our producers. Her favorite part of working with producers is designing a case that have a positive impact on clients’ lives.

Nancy is FINRA Series 7 and 66 registered, holds California Life, Annuity and Long Term care licenses.

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Ask Nancy for our exclusive and turn-key CARE Policy Review program that helps Advisors build the insurance part of their practice. You will find her professional approach and knowledge a valuable resource to your business.

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