



Westland Advanced Markets

Let Westland's talented group of experienced insurance professionals be your partner in the advanced planning world of life insurance or to provide added assistance with your large cases. With over a combined 125 years of insurance experience, the Westland Advanced Markets (WAM) team is at your service. Our team can be utilized behind the scenes, work side by side as your expert or take a more active role where a shared arrangement is appropriate. We also work with many "Fee based" Registered Investment Advisors as an extension of their Advisory Services accepting referrals. No matter what, you and your practice will always be the focus. We're just a phone call or email away.

- *Legacy & Estate Planning*
- *Buy-Sell Funding*
- *Executive Compensation*
- *Premium Financing Life Insurance*
- *Business Planning*
- *Charitable Giving*
- *Max funded Roth Alternative*
- *Business Valuations*
- *Defined Benefit*

Our Advanced Markets Team

Gene Pastula, CFP® -President and Founder of Westland Financial

A leading figure in the life insurance industry, Gene has over forty years of experience helping agents maximize their potential. Gene has authored many articles on various industry ideas and is an in-demand consultant and on-air guest expert on TV and Radio for financial advisors discussing protection strategies and wealth transfer solutions. He was the innovator of MoneyGuard® and the Linked benefit concept.

Nancy Woo, - BA Business Economics - Westland Director of Life Marketing

20 years in the planning area supporting wealth managers with a strong background working with high net worth clients. FINRA Securities licensed Series 7, 66 and is a specialist in life & long term care.

William (Bill) H. Jackson, J.D., CLU Senior Advanced Markets Consultant

Bill has a passion for helping financial services producers and is driven to assist clients with much needed protection strategies. He has a Juris Doctorate, Law, Estates, Tax, Accounting and he is a certified Charter Life Underwriter. Bill's background includes serving as an advanced planning attorney and pension manager for large insurance firms and specializes in Taxation of investment and insurance products, ERISA, Qualified Plans, Pensions, Estate Planning, Wealth Management, Life Insurance, Annuities, Investment, and Institutional Products.

Lisa (Lee) Morris, Senior Underwriter

Lee brings to the team 25 years of technical life insurance underwriting experience having been a real underwriter with a large insurance carrier. She knows how her colleagues think and how to package and manage cases to achieve the best outcome for your clients.

The Rest of Your Westland Team!

Westland Financial Services, Inc.

...Innovators of MoneyGuard

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