Meet your insurance planning team

Truist Life Insurance Services

Supporting Truist Wealth, Private Client Group (PCG), and Specialty Groups

We are pleased to introduce your Truist Life Insurance Services (LIS) insurance planning team. This team will provide an integrated approach when consulting with your clients in order to provide a seamless delivery of life insurance, long term care/linked benefits, disability insurance, and Medicare products and solutions.

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Click here to schedule a meeting

Unique to Truist, the **BDS** is an internal role dedicated to providing wealth advisors and financial advisors with education and marketing support to identify opportunities where insurance may fit into their practice. They are responsible for articulating the referral process and directing the IRM partners to the insurance strategist for design and implementation.

Primary contact

Leadership contact

Clark Smith
VP, Sales
Clark.Smith@TruistLife.com

The **Regional Insurance Strategists (RISs)** are highly skilled insurance professionals who partner with wealth advisors and financial advisors in-market to provide point-of-sale knowledge on various solutions to design and implement complex planning strategies. Your RIS is assigned at the market level and primarily works with high-net-worth and ultra-high-net-worth individuals. Working in collaboration with the BDS, they are responsible for supporting the discovery process.

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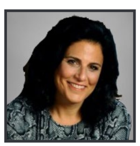

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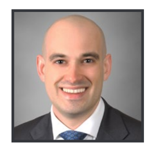

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