

Meet your insurance planning team



Supporting Premier and Investment Services Group (ISG)

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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Unique to Truist, the **BDS** is an internal role dedicated to providing advisors and bankers 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



Demian Mello

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The **Insurance Strategists (ISs)** are highly skilled insurance professionals who partner with advisors and bankers to provide point-of-sale knowledge on various solutions to design and implement insurance planning strategies. Your IS is assigned at the market level, focusing on strategies for mass affluent and emerging wealthy individuals and families. Working in collaboration with the BDS, they are responsible for supporting the discovery process.

The **Insurance Analysts (IAs)** are teammates that work with the ISs in their region to facilitate transactional business and coordinate communications between the IRM partner, client, and the IS. They are able to make recommendations for traditional individual client needs.



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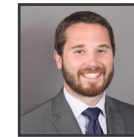
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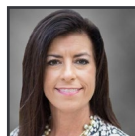
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