



# SPECIALIZED RESOURCES

STRATEGIC PARTNERSHIPS

## LEVERAGE FOR FUNDING WEALTH TRANSFER ARRANGEMENTS

As experts in life insurance design and implementation, TrustDesign is a Member Office of ValMark Securities, an elite group of the nation's leading, independent wealth-transfer advisors. Collectively, this group has an estimated \$40 billion of in-force insurance with the industry's top life insurance companies – giving them preferred access and leverage to negotiate arrangements on behalf of their clients.

## INDUSTRY'S TOP INDEPENDENT UNDERWRITING RESOURCE

Because the single most important impact on insurance pricing is successful underwriting, ValMark maintains one of the most distinguished underwriting teams in the industry, including four former insurance company vice-presidents of underwriting and a Board-Certified MD. As a ValMark Member, TrustDesign is able to leverage this team of underwriting advocates to help strategically obtain the best possible underwriting and pricing decisions for our clients. This is accomplished by providing an enhanced level of insurance, medical and risk evaluation expertise in order to confidentially represent, clarify and coordinate the details of the application throughout the underwriting process.

## UNIQUE RESOURCES FOR BUSINESS OWNERS

As an extension of his passion for comprehensive planning, Dan Guglielmo recently co-founded both the Exit Planning Exchange (XPX) and the XPX Owner's Academy. Both organizations are based out of Babson College in Wellesley, MA. The XPX mission is to unlock the collaborative potential of the owner's advisory team. The Owners' Academy is a special place where entrepreneurs engage in a dynamic and rigorous dialog about the creation of sustainable and transferable value in their enterprise. The explicit goal here is to pass the business forward to create meaningful personal wealth and fulfillment. Both of these organizations have received critical acclaim in the greater Boston community and are now in five east coast cities. Mike Oleksak of Trek Consulting and Shannon Zollo of Morse Barnes-Brown and Pendleton are the co-founders with Dan.