

**ACCESSWIRE**

## Financial Strategies Group Acquires Five of the Top Eight Wells Fargo Advisors

**Provided by Accesswire**

Oct 30, 2019 9:00 AM CDT

**CRYSTAL LAKE, IL / ACCESSWIRE / October 30, 2019** / Financial Strategies Group LLP (FSG), a full-service insurance general agency (GA) catering to the high-end product market, has partnered with five of Wells Fargo's top eight estate planning and life insurance specialists.

Attracted to FSG's unprecedented hands-on sales support and unique corporate structure, where producers are equal partners rather than employees, Chuck Adam, Erik Copeland, Doug Dunne, Jorge Fuentes and Rick Stein teamed up with FSG's back office and created the distribution company MERiTAGE. This move triples the size of FSG and dramatically expands the agency's nationwide presence.

"FSG allows us to create our own comprehensive delivery model for institutional and RIA clients. The superior support and technology will improve delivery speed and accuracy during our planning process, enhancing the client experience," Copeland says.

"This GA has the experience and knowledge to work with major banks and wirehouses. As a former Wells Fargo insurance specialist, this is very important as we continue to work with private banks and financial advisors," Fuentes adds.

"The proactive staff at FSG has allowed us to transition without a break in momentum. I am very excited to be affiliated with such a well-oiled machine.

Every aspect of on-boarding here is completely transparent and straightforward," Adams says.

This new partnership adds millions of dollars of targeted premium to FSG. "We are excited about the growth we've experienced and think the future is even bigger," says partner and estate planning consultant Jamie Farmer. "We strive to be a next-generation GA that focuses on new technology and creative ideas without the management costs that most GAs charge."

FSG is a support channel for financial advisors and is run by salespeople. Its strategic corporate structure enables FSG to adapt procedures and technologies faster than other firms can, keeping it perpetually up to speed with modern consumers' demands.



### **About Financial Strategies Group**

Financial Strategies Group, LLP was founded in 2008 and is a full-service insurance general agency that offers comprehensive point of sale to financial advisors and their clients. FSG specializes in complex strategies including wealth transfer, business succession, long-term care and supplemental retirement income planning. Details on FSG's services and how to join the agency are available at [www.FSGLLP.com](http://www.FSGLLP.com).

#### **CONTACT:**

Jamie Farmer

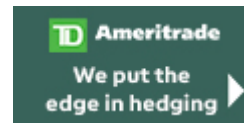
[Jamie.Farmer@fsgllp.com](mailto:Jamie.Farmer@fsgllp.com)

**SOURCE:** Financial Strategies Group

View source version on accesswire.com:  
<https://www.accesswire.com/564644/Financial-Strategies-Group-Acquires-Five-of-the-Top-Eight-Wells-Fargo-Advisors>

---

## Sponsor Center



© Copyright 2019 Morningstar, Inc. All rights reserved.  
Dow Jones Industrial Average, S&P 500, Nasdaq, and Morningstar Index (Market Barometer) quotes are real-time.