DAVID M. BAILEY, *LUTCF, FICF, AAI, CSA*

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PHILOSOPHY

Helping agents and clients navigate through the Public Employee, Social Security and Personal Financial Retirement Mazes to maximize their retirement income through proper planning by integrating conservative savings plans, tax planning, best pension option choices, long term care planning and Social Security decisions.

RESUME

DEVELOPMENT MANAGER – Retirement Nationwide, Inc.

2019-Present – Developing Advisors and Clients professionally and honestly to serve their needs in the concept of Defensive Retirement Planning.

REGIONAL BUSINESS DEVELOPMENT REPRESENTATIVE – Midland National Life

2016-2019 – Recruiting and training Broker Dealers for MNL Production.

FIELD AGENT - GENERAL AGENT – Knights of Columbus

1993-2016 – Offered Comprehensive Financial Needs Analysis, Post or Pre-Retirement Income Analysis and Long-Term Care Planning assessments in training to my Agents and helping my personal clients by utilizing appropriate products according to need.

AGENCY OWNER – Benefit Alternatives

1989-1993. As Agency Owner I had the responsibility of recruiting, training and motivating my sales force in Life and Health related products. This was done in seminar format. Our sales force of 168 affiliated agents managed the contracts for over 1,680 locally owned businesses.

PRODUCTION-MARKETING MANAGER – Bailey Ins Agency and Eaton * Bailey Insurance, Inc.

1981-1989. As Vice President of Eaton * Bailey Insurance, Inc., I had the supervisory authority for marketing, production and sales management of all Personal Lines, Life, Health and Financial Services and developed a successful life and group health insurance marketing program.

ACCOUNT EXECUTIVE – De Leon Insurance Agency, Inc.

1978-1981. I was responsible for Personal, Commercial, Life, Health and Financial Services production on new clients to the agency. I developed and expanded several marketing programs to produce new accounts until the agency was sold in 1981.

REGISTERED SALES REPRESENTATIVE – Metropolitan Life

1972-1978. As Registered Representative for Met Life, it was my responsibility to service existing accounts and to sell a complete financial services product line to new individuals and businesses. I was licensed for property & casualty in 1976 to expand my expertise in Total Financial Planning.