

# PRUDENTIAL'S ADVANCED PLANNING GROUP

## Our Mission

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Our team of attorneys\* and consultants work with financial professionals on a case- by-case basis, providing personalized guidance unique to each situation. We stand apart with more than **142** years of combined experience in estate, business, retirement income, wealth distribution and tax planning strategies, using annuities to help our distribution and sales partners drive new business. Our Sales Technology team focuses on the technology trends that impact financial professionals. We can also provide seminar support, including continuing education, industry and firm presentations, CPA and attorney networking, and client seminars. Topics on which we consult and present include, but are not limited to:

### Advanced Planning

- Retirement Income Planning
- Social Security Strategies
- Health Care Planning in Retirement
- Tax Planning
- Estate Planning
- Wealth Transfer
- Charitable Planning

### Sales Technology

- Fintech Platforms
- Financial Planning Software Programs
- Social Media
- Identity Theft
- Blockchain and Digital Assets
- Artificial Intelligence
- CRM Systems

## Meet the Team

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**Brandon Buckingham J.D.\*, LL.M.**  
***Vice President, Advanced Planning***

- 33 years in financial and legal services
- 22 years in Advanced Planning
- Brandon leads the Advanced Planning Group. He and his team provide technical, marketing and sales support for all matters concerning variable annuities, retirement, estate, gift and income tax planning, and other advanced planning topics. Brandon is a frequent speaker and published author on subjects including IRAs, qualified retirement plans, annuities, and estate and income tax planning.



**Prudential**

# PRUDENTIAL'S ADVANCED PLANNING GROUP

## 888-425-1022

### Advanced Planning Field Representatives



**Stephen Gilbert, CFP®, CLU®, ChFC®, RICP®**  
**Vice President, Advanced Planning Field**

- 29 year in financial services
- 13 years in Advanced Planning
- Areas of Focus: IRAs, qualified plans, retirement income planning, Social Security and Medicare, beneficiary income planning



**Chris McGovern, CFS®, CLU®, ChFC®, AEP®**  
**Vice President, Advanced Planning Field**

- 19 years in financial services
- 11 years in Advanced Planning
- Areas of Focus: IRAs, Social Security and Medicare, retirement income planning, beneficiary income planning, estate planning



**James Verbonitz, CFP®, ChFC®, CLU®**  
**Vice President, Advanced Planning Field**

- 20 years in financial services
- 9 years in Advanced Planning
- Areas of Focus: Social Security and Medicare, retirement income planning, annuities and trusts

### Sales Technology Team



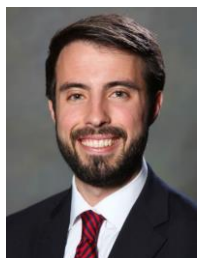
**Timothy Cintolo, CFP®, ChFC®**  
**Vice President, Sales Technology**

- 15 years in financial services
- 5 years in Sales Technology
- Areas of Focus: Implementation of sales technology to help financial professionals grow their business.



**Christina Cuffari**  
**Vice President, Sales Technology**

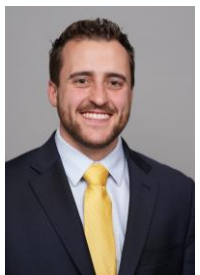
- 12 years in financial services
- 7 years in Sales Technology
- Areas of Focus: Implementation of sales technology to help financial professionals grow their business.



**Alex McGuire**  
**Manager, Sales Technology**

- 9 years in financial services
- Areas of Focus: Implementation of sales technology to help financial professionals grow their business.

### Advanced Planning Consultants



**Mike Kelsall, RICP®**  
**Manager, Advanced Planning**

- 5 years in financial services
- Areas of Focus: IRAs, qualified plans, retirement income planning, Social Security and Medicare, beneficiary income planning



**Chris Price, J.D. \*, ML&T, ChFC®, CLU®**  
**Director, Advanced Planning**

- 40 years in financial services
- 9 years in Advanced Planning
- Areas of Focus: Social Security and Medicare, retirement income planning, annuities and trusts



**Kris Walewski, MBA**  
**Project Manager, Process Management**

- 32 years in financial services
- Areas of Focus: Continuing Education and Project Management

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