



Winged Keel Expands into Mid-Atlantic with Acquisition of BCG Companies

NEW YORK, NY, JANUARY 30, 2019—Winged Keel Group (“Winged Keel”) today announced the opening of its Washington, D.C. and Richmond, VA offices, which will be led by Principal Jeri L. Turley. Joining Jeri will be Eric Hieber who will have the title of Director at Winged Keel. Vernon Holleman, III will be a Marketer. The new offices follow the addition of a Boston office in 2018, and a San Francisco office in 2016. Winged Keel is headquartered in New York City.

BCG Companies Founder Jim Belk stated, “After exploring many options for BCG, it was clear that Winged Keel and its robust platform was the absolute best succession plan for me and BCG so that we can continue to live up to the long-term promises we have made to our clients. I could not be more excited for the BCG Team and our clients.”

Jeri Turley joins Winged Keel after serving as President and Principal of BCG Companies in Richmond, VA, and BCG Holleman in Chevy Chase, MD, working closely with high-net-worth clients and their advisors through the wealth transfer process and providing succession planning for public and privately held companies. Jeri serves on the Board of Directors of M Financial Holdings, Inc. and is the acting Secretary-Treasurer on the Executive Committee for the Association for Advanced Life Underwriting (AALU).

Eric Hieber joins Winged Keel after serving as a Principal of BCG Companies in Richmond, VA, where he oversaw the case design team and worked closely with clients and advisors to customize solutions in the wealth transfer, estate planning, and business continuity planning markets. He is an active member of AALU and serves as President of the Estate Planning Council of Richmond, VA.

Winged Keel Principal Alexander Tuff said, “It is a great pleasure, and honor, to welcome the BCG Team. The organization and management team are highly respected leaders in the life insurance industry. Their significant experience, community connections, and industry expertise—supported by a shared culture and mission—fuels our strategic objective of covering our key clients, family offices, and centers of influence with the brightest and most respected professionals in the industry.”

Jeri Turley added, “We are incredibly excited to be joining Winged Keel, a truly independent and entrepreneurial-minded company. I have known and respected the Winged Keel team for my entire career, and it is undoubtedly the strongest and best-in-class platform in our industry for servicing the ultra-affluent market. We look forward to bringing the full suite of resources and expertise to our clients.”

About Winged Keel Group

Winged Keel Group is an independent life insurance brokerage firm that creates and implements tax-efficient, multi-generational wealth accumulation and wealth transfer strategies for ultra-high net worth families. With offices in Boston, New York, and San Francisco, and new presence in the Mid-Atlantic region, the firm specializes in the structuring and administration of large blocks of Traditional Life Insurance and large portfolios of Private



Placement Life Insurance and Annuities. For more information on Winged Keel Group, please visit www.wingedkeel.com.

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