



WINGED KEEL GROUP®

FOR IMMEDIATE RELEASE

Brian Gartner Promoted to Managing Director, Head of San Francisco

NEW YORK, NY, JANUARY 14, 2019—Winged Keel Group (“Winged Keel”) today announced the promotion of Brian Gartner, Managing Director, Head of San Francisco, effective immediately. In his new role, Brian’s leadership will remain focused on expanding Winged Keel’s national presence as a market leader in the design, implementation, and administration of sophisticated life insurance and annuity portfolios for ultra-affluent families.

Brian joined Winged Keel Group in 2011 as an Associate, advancing into the role of Client Relationship Manager and helping open the firm’s San Francisco office in 2016. Brian will have management responsibility of Winged Keel’s California office and will be a key point of contact for Winged Keel’s West Coast client and advisor relationships.

Winged Keel Principal Eric Naison-Phillips commented: “Brian has done an incredible job solidifying our firm’s presence on the West Coast. We are excited to recognize the commitment he made to Winged Keel when he moved to San Francisco and the incredible work he has done over his tenure to live up to the promises we make to serve our clients for the long term. I speak on behalf of the entire Partnership in congratulating Brian on his well-deserved appointment and look forward to his continued success as a leader of this firm.”

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, 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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