



Winged Keel Group Expands into Texas with Acquisition of Knight Planning Corporation

NEW YORK, NY, JANUARY 12, 2021—Winged Keel Group (“Winged Keel”) today announced the acquisition of Knight Planning Corporation and opening of its Houston office, which will be led by Principal Brady C. Knight. Joining Brady will be his longtime colleagues, Douglas Doughty, who will have the title of Director, Case Design and Merrill Rome, who will serve as Office Manager and provide operational and client service support. The expansion to Houston follows another exceptional year of growth within the firm’s Traditional Life Insurance, Business Continuation Insurance, and Private Placement Life Insurance businesses. In recent years, Winged Keel has extended its footprint from New York City, where the firm is headquartered, to San Francisco, Boston, Richmond, and Washington, D.C.

Brady Knight joins Winged Keel’s leadership after serving as Founder and CEO of Knight Planning Corporation in Houston, working closely with ultra-affluent families, business owners, key executives, and their legal and accounting advisors. He brings extensive experience in the structuring, implementation, and servicing of life insurance and annuity portfolios designed to optimize multi-generational wealth accumulation and wealth transfer strategies. Brady is a native Texan and serves on the Board of Directors for the Houston chapter of the National Association of Insurance and Financial Advisors and The Whitehall Club.

Douglas Doughty previously served as Director of Planning for Knight Planning Corporation, where he was responsible for product research, advanced planning techniques for estate and business planning, and overseeing financial underwriting. He brings vast industry knowledge and experience to the firm.

Winged Keel Principal Eric Naison-Phillips said, “We have known Brady and his team for many years and collaborated on numerous opportunities. The friendship and business success that emerged was the critical foundation that enabled both sides to move forward with this partnership. It is an honor to welcome Brady, Doug, and Merrill, with whom we share common ethics and a dedication to working hard every day to deliver an exceptional client experience. Their product knowledge, market presence, and commitment to excellence make them the perfect team to lead our presence in Houston and support sophisticated clients, family offices, and centers of influence in the area.”

Brady Knight added, “Joining Winged Keel commences an exciting new chapter for us, and the complete alignment of our core values makes this an easy transition. The firm’s continual investment in infrastructure is peerless amongst life insurance brokerage firms that cater to ultra high net worth clients and their advisors. We look forward to bringing these resources to those who have placed their trust in us over the last two decades.”

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 New York, San Francisco, Boston, Richmond, Washington, D.C., and Houston, 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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