



Winged Keel Group Expands into Atlanta with Acquisition of Nease, Lagana, Eden & Culley

NEW YORK, NY, JANUARY 12, 2023—Winged Keel Group (“Winged Keel”) today announced the acquisition of Nease, Lagana, Eden & Culley (“NLEC”) and opening of its Atlanta office, which will be led by Principals Brent Eden and Walt Helms. The new Winged Keel Atlanta office will be comprised of a 17-person team of client relationship managers and brokerage service professionals under their leadership. The expansion to Atlanta follows Winged Keel’s most recent office opening in Houston and another exceptional year of growth within the firm’s Traditional Life Insurance, Business Continuation Insurance, and Private Placement Life Insurance businesses, along with the development of a Corporate-Owned Life Insurance segment.

NLEC is among the most highly respected life insurance brokerage firms that service ultra-affluent families, business owners, private investors, and executives. The firm was formed by Mac Nease, John Lagana, Mark Eden, and Dave Culley in 1988 on the premise of providing the highest level of insight, expertise, products, and services. The firm’s leadership brings extensive experience in the structuring, implementation, and servicing of life insurance portfolios designed to help optimize wealth transfer and preservation.

Industry veterans Mac Nease and Dave Culley have a longstanding history of representing their clients and industry both locally and nationally. Mac served as a member of the Board of Directors of M Financial Group for 32 years and has been a steward of product development his entire career, tirelessly advocating for the sophisticated, customized insurance solutions ultra-affluent families have access to today. Dave served a key role in industry advocacy in Washington, D.C. as Past President of the Association for Advanced Life Underwriting (now Finseca) and was President of the Atlanta chapters of the National Association of Insurance and Financial Advisors (NAIFA) and Society of Financial Service Professionals (SFSP). They, along with Brent Eden, Walt Helms, and advisor education specialist Peter Fleming, continue the firm’s tradition of providing a differentiated level of expertise, service, and professionalism.

Brent Eden was elected to the Board of Directors of M Financial Group in 2021 and currently serves on the Audit, Compensation, and Member Firm Compensation Plan Committees. He is the Immediate Past President of the Estate Planning Council of North Georgia and a member of the Atlanta Estate Planning Council. He is also a member of the American, Georgia, and Atlanta Bar Associations, and holds the Trust & Estate Practitioner (TEP) designation as a member of the Society of Trust & Estate Practitioners (STEP). He is also a member and participates in the Ambassador program of Finseca, the top advocacy and development organization for life insurance and financial security professionals.

Walt Helms is also a member of Finseca as well as the Atlanta Estate Planning Council, and he regularly speaks at conferences on topics including life insurance and sophisticated strategies to efficiently transfer assets over multiple generations. He has previously served as a member of the Government Affairs Committee and Product Development Group for M Financial Group, where he played a key role in advocating for the industry regarding the appropriate tax and regulatory treatment of life insurance and advising life insurance companies on product development. Additionally, he has held teaching positions at Georgia State, Emory, and Oglethorpe University.



Winged Keel Principal Eric Naison-Phillips said, “We have known and respected the NLEC team for many years and have always been aligned in our vision for the future of the industry, collaborating on various committees to work with insurance companies and various partners to create optimal solutions for ultra-affluent clients. We are delighted to welcome the entire team to Winged Keel, whose extensive product knowledge, market presence, and delivery of an exceptional client experience make them the perfect fit to lead our presence in Atlanta and support sophisticated clients, family offices, and centers of influence in the area.”

“We are incredibly proud of the business we built over 35 years and grateful to the clients and advisors who have placed their trust in us. This is an exciting new chapter in which the business will continue to thrive under Winged Keel’s sustainable, multi-generational services and with Brent and Walt at the helm of their Atlanta office,” said Mac Nease. “The combination of Brent and Walt’s institutional knowledge, the integrity of NLEC, and cutting-edge platform of Winged Keel makes for an incredible partnership to help face the current and future needs of our clients and their advisors,” continued Dave Culley.

“Winged Keel’s operational depth, multi-generational governance structure, and complete alignment with our commitment to exceeding the expectations of our clients and their advisors made it an easy decision to combine forces,” said Walt Helms. “We look forward to bringing these combined resources to our clients as well as continuing to grow and evolve our business,” added Brent Eden.

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., Houston, and Atlanta, 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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