



## **TOM WORTHINGTON, CEP**

Business Planning Consultant

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Tom has earned a Business Management degree from Jacksonville University. He entered the life insurance and financial business planning markets in 1976 with FM Financial Services. Tom excelled in this business and was promoted to a management position. He managed a branch office that specialized in financial services for business owners and closely held companies. He joined the Newport Group in 1985, marketing COLI/BOLI plans to finance long-term benefit liabilities for the Fortune 200 marketplace. In November of 1999 Tom was offered a management position with Capitas Financial, which became The Pinnacle Group.

Tom has over 15 years of experience in partnering with banks, national accounts, regional firms, and independent advisors. Tom is a member of the Pinnacle Business Planning Center of Excellence and specializes in providing the best possible consulting services to his clients. He takes pride in offering customers case design, case consultation, and point of sales support. That support includes Informal business valuations, transition and buy-sell planning, and qualified defined benefit plans and non-qualified key executive plans for professional practices and entrepreneurs.

Tom is an affiliated member of the NICEP (National Institute of Certified Estate Planners). He is registered to offer CE and CPE courses for financial advisors, CPAs and independent advisors in long term care plans, retirement, and business planning.

In his spare time, Tom likes to travel with his wife and family and enjoys playing golf.

