

David R. Foster

Senior Director, Advanced Markets and Solutions

Background

Over 25 years in the financial services industry, assisting clients and supporting financial professionals on complex life insurance strategies, estate planning, executive compensation, business succession, charitable planning, and retirement planning.

Experience

- Focused on building out advanced marketing strategies and capabilities, including content development and internal trainings.
- Assists in the development of our advanced marketing demonstration capabilities.
- Supports underwriters on cases involving complex life insurance strategies.
- Participates in speaking engagements and virtual presentations for FMOs.
- Provides case design support for financial professionals.
- Assists in the development of our premium financing and foreign nationals programs.
- 10 years as an independent planned-giving consultant for charitable organizations and six years as a financial/life insurance advisor.
- Author of two books.

Education, certifications, and memberships

- J.D. from the Widener University School of Law (Delaware)
- AEP, CLU, ChFC, and CAP designations

→ FOCUSED ON:

- Trust and estate planning
- Business succession planning
- Executive compensation
- Charitable planned giving
- Advanced life insurance taxation