



L. Kelly LaVigne

Vice President, Advanced Markets and Solutions

Background

With more than 25 years in the financial services industry, LaVigne has broad experience in Social Security, Medicare, tax, and regulatory issues related to IRAs and qualified plans, as well as most areas affecting retirement income and legacy planning.

Experience

- Has served over 25 years in the financial services industry, focusing on helping financial professionals in acquiring and serving clients with retirement planning, estate planning, and other tax-related strategies.
- Leads Advanced Markets and Solutions annuity team, focused on development and communications of key retirement-related issues.
- Has conducted thousands of meetings for financial professionals on retirement-related issues and strategies.
- Speaker at industry events on trends and changes in retirement planning.

Featured in

- USA Today, U.S. News & World Report, Kiplinger, CNBC, Financial Advisor Magazine

Education, certifications, and memberships

- B.A. in Communications from Central Connecticut State University
- Juris Doctor from Western New England University School of Law (Massachusetts)
- FINRA 6 and 26 securities registrations
- Life Insurance licensed
- Licensed attorney in Connecticut

→ FOCUSED ON:

- Retirement income strategies
- Social Security
- Medicare
- IRAs
- Estate planning
- Taxes and regulations regarding qualified accounts
- Allianz Life thought leadership studies

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