



# L. Kelly LaVigne

VP, Head of Annuity Advanced Markets

## Background

With more than 30 years in the financial services industry, LaVigne has broad experience in retirement income and legacy planning, including Social Security, Medicare, tax, and regulatory issues related to IRAs and qualified plans. LaVigne is a spokesperson for Allianz Life studies about Americans' attitudes and experiences about retirement.

## Experience

- Has served over 30 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 Annuity Advanced Markets team, focused on development and communications of key retirement-related issues.
- Spokesperson for Allianz Life studies about Americans' attitudes and experiences around retirement.
- 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, CBS MarketWatch, InvestmentNews, Investopedia

## 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 Series 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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