

Jeng Chiu

Vice President, Annuity Advanced Markets

Background

With more than 25 years in the financial services industry, Chiu has a strong background in retirement strategies and a talent for translating complex financial concepts into clear, actionable guidance for financial professionals and their clients.

Experience

- Supports financial professionals with advanced financial planning strategies related to taxes, retirement income, and estate planning.
- Featured speaker at industry events, presenting financial planning tools and resources that help increase client engagement through holistic planning.
- Previously held positions at Equitable, Delaware Life Insurance Company, and Prudential Financial; began his career as a financial advisor.

Education, certifications, and memberships

- B.A. in accounting from the University of Texas at Austin
- J.D. from the University of Houston Law Center
- CERTIFIED FINANCIAL PLANNER™
- FINRA Series 7, 24, and 63 securities registrations

→ FOCUSED ON:

- Retirement strategies
- Financial planning tools
- Holistic financial planning

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