Allianz

Allianz Life Insurance Company of North America

Waldean Wall

Vice President, Advanced Markets and Solutions

Background

With more than 40 years in the financial planning industry, Wall brings deep experience to Allianz Life Insurance Company of North America (Allianz Life). As a financial advisor for 25 years, he worked primarily as a tax consultant and accumulation specialist. During his 18 years at Allianz Life, he has focused primarily on tax planning and strategy, retirement income, and legacy transfer planning.

Experience

- Responsible for assisting Allianz Life financial professionals and their clients with financial, estate, and retirement planning goals.
- Featured speaker at industry conferences, Allianz Life-sponsored events, and client meetings.
- Previously worked in tax consulting and preparation.

Education, certifications, and memberships

- MSFS from the Institute of Business and Finance
- M.A. from Bethel University (Minnesota)
- Chartered Financial Consultant (ChFC) designation
- FINRA Series 7 and 63 securities registrations

→ FOCUSED ON:

- Tax planning and strategy
- Retirement income
- Estate and legacy transfer planning
- Social Security planning

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