



Heather Kelly

Senior Vice President of Advisory
and Strategic Accounts

Background

With over 25 years in the financial services industry, Kelly has diverse experience in driving strategy, insurance integration, and growth in the insurance and advisory channels. Prior to coming to Allianz Life Insurance Company of North America (Allianz Life), she served in senior leadership roles at United Capital and Goldman Sachs, and has also held leadership roles at various other insurance and insurance distribution organizations.

Experience

- Helps drive Allianz Life strategy, integration, and growth in the Registered Investment Adviser segment and institutional partnerships.
- Speaker at industry events on trends and changes in retirement planning, insurance planning, and financial planning.
- Specializes in deploying strategic initiatives to educate financial professionals and clients on how properly designed and executed risk management solutions can help address financial instability.
- Built and fostered platforms that promote integrating risk management strategies into the planning process.
- Experience in educating financial professionals and firms on how properly designed, executed, and managed insurance-based products can augment global planning and financial stability.
- Diverse background at home office, financial professional, and executive levels uniquely positions her to help advance insurance integration and hasten adoption of risk management tools.
- Has been a Investment Adviser Representative and Registered Representative.

Education, certifications, and memberships

- Attended University of California, Berkley, Haas School of Business
- Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), and Registered Health Underwriter (RHU) professional designations
- Nominee for InvestmentNews' 2020 Women to Watch
- First nationwide recipient of The Young Professional Honor from Athena International

FOCUSED ON

- Insurance integration into the financial planning process
- Retirement income strategies
- Managing risk in retirement planning
- Risk management tools and adoption
- Educating and deploying insurance-based solutions within the advisory channel
- Allianz Life thought leadership studies

