

Stephen Belch

Estate Planning Consultant

JOB DESCRIPTION

As an Estate Planning Consultant for British Columbia, the Yukon and the Northwest Territories, Stephen is responsible for delivering value-added, personalized and comprehensive insurance and estate planning support to Assante advisors and their clients.

KEY RESPONSIBILITIES

- Provide professional advice to high net worth clients
- Generate ideas that address the unique tax and legal circumstances of Assante clients
- Deliver insurance solutions to Assante advisors that address their clients' estate creation, estate preservation, estate transfer, wealth accumulation and wealth transfer goals in a cost effective and tax efficient manner

BIO

Stephen has worked in the life insurance industry since 1988. Before joining Assante, Stephen held a number of positions, including group life and health underwriting, human resources development, and special risk (snowbird travel insurance) at Crown Life. He was a sales agent for Equitable Life and an Individual Life marketing consultant and product specialist at Empire Financial Group.

Stephen's current responsibilities at Assante include the implementation of risk management solutions for advisors in his territories. He provides hands on advisor and client case consulting skills and training services and promotes the professional application of risk management solutions in the financial planning practices of his advisors.

Stephen sits on the Insurance Council of British Columbia as a non-voting member. He is Nominee of AEIS in BC and is Assante's Designated Representative for Alberta. In his spare time, Stephen enjoys telemark skiing, mountain biking, sportbike motorcycles, playing guitar, and hiking and camping with his fiancée, Christina, & his dog, Daisy.

CONTACT INFO

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