**FRANK M. CAMPBELL, CLU, ChFC**

**Stratus Financial Partners**

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*Expert in life, disability and long-term care insurance as well as annuities. 30+ years’ experience as a high-producing agent with a Fortune 500 insurer. Past Life and Qualifying Member of Million Dollar Round Table – a trade group of top insurance producers. Chartered Life Underwriter. Chartered Financial Consultant. Licensed Life and Disability Analyst. Has reviewed and analyzed hundreds of insurance policies for issues such as suitability, expiration, conversion, value, and health of the insurer.*

**EMPLOYMENT HISTORY**

**Stratus Financial Partners**, Riverside, CA 2011-Present

Owner

Our primary focus is review, evaluation and guidance on the health and viability of existing, in-force life insurance and annuity policies. We also bring perspective and guidance to the acquisition of new insurance policies. Our specific focus areas are life, disability, long-term insurance, and annuities.

**Trinity Financial Partners**, Ontario, CA 2006-2011

Life Specialist

Financial planning firm. Focused on identifying the most effective solutions to client’s insurance needs.

**Prudential Insurance Company**, Ontario, CA 1973-2005

Senior Agent, Investment Advisor

Fortune 500 company. Served as a full service holistic financial advisor for retirement, business, estate planning, investment and insurance advice. All integrated under one coordinated plan to promote efficiency and successful outcomes for clients.

**LICENSES**

CA Licensed Life Settlement Broker 2020

CA Licensed Life & Disability Analyst 2017

CA State Variable Life & Variable Annuity 1983 – present

FINRA Series 6 & 65 Investment Advisor 1982 – 2018

CA State Life Insurance Agent 1978 – present

CA State Property & Casualty Agent 1978 – 2006

NY State Property & Casualty Agent 1974

NY State Life Insurance Agent 1973

**EDUCATION**

**SUNY**, *Buffalo, NY* 1973

BA Political Science

**United States Navy** 1967-1971

Submarine Qualified

**CERTIFICATIONS**

**Chartered Financial Consultant** (ChFC)

American College of Financial Services 1986

**Chartered Life Underwriter (**CLU)

American College of Financial Services 1983

**PROFESSIONAL AFFILIATIONS**

**American Society of Financial Services Professionals** (FSP)

**Arrowhead Chapter Financial Services Professionals** (Past President)

**National Association of Estate Planning Councils** (NAEPC)

**Riverside Estate Planning Council**

**San Bernardino Estate Planning Council** (Past President)

**Past Life & Qualifying Member of the Million Dollar Round Table** - *Less than 1% of Life Insurance Professionals are members of this premier industry organization.*

**PUBLICATION**

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