Advanced Markets and Solutions

Discover the value of Advanced Markets and Solutions.

Support you can count on

When you meet with clients and prospects, it's usually one-on-one. But with Advanced Markets and Solutions in your corner, you have an experienced team behind you. That's because the Advanced Markets and Solutions team will help ensure you have the best advanced training and support you need to achieve success.

YOU CAN DEPEND ON ADVANCED MARKETS AND SOLUTIONS TO HELP WITH:

Advanced Markets and Solutions can help you with training, marketing, and technical questions and cases.

Training:

- The issues specific to women and money, including life events, communication style, and more.
- Help clients better understand their financial role and show them how to begin taking the next step forward.

Marketing:

- We have a variety of marketing and sales materials to help enhance your success in the retirement marketplace.
- We offer client seminar packages to help expand and segment your markets.
- We house a producer website with all our marketing pieces in one place.

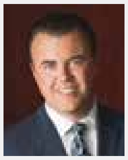
Technical questions and cases:

- We have experienced professionals, such as individuals with law degrees, as well as CPAs, CLUs, and ChFCs who specialize in taxation, Social Security, retirement planning, estate planning, and life insurance techniques.
- We have knowledgeable Advanced Markets and Solutions consultants who are available to assist you with complicated advanced markets questions and case design on retirement planning, estate planning, and taxes. (The Advanced Markets and Solutions consultants do not provide tax or legal advice. Please have clients consult with their tax advisor or attorney.)

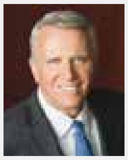
Allianz Life Insurance Company of North America
Allianz Life Insurance Company of New York

AMK-252-N (R-11/2020)

The Advanced Markets and Solutions Team

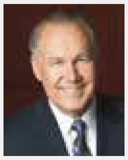


Todd Petit, ASA, MAAA | Senior Vice President and Actuary for Advanced Markets and Solutions, Specialty Markets, and Life Training
Todd manages the Advanced Markets and Solutions team and advises on advanced uses of life insurance and annuities. Over his 27 years in the insurance industry, he's designed variable life, variable annuity, fixed life, term life, and long term care products. An Associate of the Society of Actuaries and a Member of the American Academy of Actuaries, Todd has spoken as a life insurance expert at conferences, seminars, and webinars.

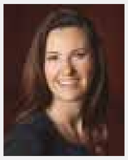


L. Kelly LaVigne, JD | Vice President of Advanced Markets and Solutions
As vice president of Advanced Markets and Solutions, Kelly LaVigne oversees and directs the strategic direction of annuity content creation and communication of key retirement-related issues. His expertise extends to financial professionals who acquire and serve clients in the realm of Social Security, Medicare, tax, and regulatory issues related to IRAs and qualified plans, as well as most areas affecting retirement income and legacy planning. LaVigne has contributed to several industry publications as well as a book on retirement income planning. With more than 25 years of experience, he holds a Juris Doctor, a Bachelor of Science degree in communications and marketing, and FINRA Series 6 and 26 securities registrations.

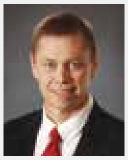
David Foster, JD, AEP, CLU, ChFC | Vice President of Advanced Markets and Solutions
As vice president of Advanced Markets and Solutions, Foster oversees and directs life insurance and estate planning strategies and content creation. He supports financial professionals on complex life insurance strategies, estate planning, executive compensation, business succession, charitable planning, and retirement planning. With over 25 years in the financial services industry, he has authored two books, earned his Juris Doctor, and spent six years as a financial and life insurance professional. He earned the AEP, CLU, ChFC, and holds CAP and FLMI designations.



Waldean Wall, MSFS, ChFC, EA | Vice President of Advanced Markets and Solutions
Wall helps financial professionals and their clients with their financial, estate, and retirement planning goals and has over 30 years of experience speaking at conventions and top producer meetings around the country. He holds a master's degree in financial services, ChFC and EA designations, and FINRA Series 7 and 63 securities registrations.



Aimee Lynn Johnson, CRPC, CLU, CDFA, ChFC, BFA | Vice President of Advanced Markets and Solutions
Johnson has 21 years of industry experience, including experience as a financial professional. In her current position, Johnson is responsible for speaking with clients and financial services professionals about ways to effectively accumulate, protect, and distribute wealth. Johnson has been a speaker at national and regional events throughout the country. She specializes in topics related to women's markets, divorce, Social Security, health care, and retirement. She holds FINRA Series 7 and 63 securities registrations.



Chuck Ostrom, CPA/PFS | Senior Advanced Markets and Solutions Consultant
With over 28 years of experience, Ostrom specializes in contract structure; estate, gift, and income taxation; and retirement plans. He educates financial professionals through one-on-one consultations and the creation of marketing materials. He has earned his MBA in new venture management, is a CPA/PFS, and holds FINRA Series 7 and 63 securities registrations.

Dave Vogel, CFP, CLU, ChFC | Senior Advanced Markets and Solutions Consultant
With 19 years of financial services experience, Vogel has an advanced markets background with both life insurance and annuities. He helps educate financial professionals on a variety of topics, including tax-efficient retirement, estate, and business planning strategies. He holds CFP, CLU, and ChFC designations, as well as FINRA Series 7 and 63 securities registrations.

For help with your Advanced Markets and Solutions cases and questions, call the Sales Desk at 800.542.5427 or the FASTeam at 800.950.7372, and ask for Advanced Markets and Solutions.