

# Advanced Strategies Team

*Your trusted resource for complex solutions*

OneAmerica® is pleased to introduce our Advanced Strategies team. The team is comprised of creative thinkers who understand tax law, financial planning and complex insurance solutions. Let the team support you and your clients' needs with sophisticated, personalized solutions.

**Areas of focus include:**

- Estate planning
  - Wealth transfer
  - Estate equalization
  - Tax reduction and estate liquidity strategies
- Business insurance planning
  - Business continuation
  - Key person
  - Executive benefits (non-ERISA)
- Long-term Care (LTC) planning
  - Tax reduction
  - Business owner tax advantages
- Charitable giving
  - Trust strategies that benefit the donor and charity
  - Tax-efficient giving strategies



## Meet the team

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**Kelly Hall**  
**CPA, CLU, ChFC, RICP**  
Advanced Strategies Director

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Kelly joined OneAmerica in November of 2019 after serving as an Advanced Planning Officer for 17 years with Ohio National Financial Services in Cincinnati, Ohio. Prior to her involvement with the insurance industry, Kelly worked as a financial manager and accountant for a large employer in Cincinnati.

Kelly's education includes a BS in accounting and business management from Emory and Henry College, graduating magna cum laude.



**AJ Reiber**  
**JD, CLTC**  
Advanced Strategies Director

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AJ joined OneAmerica in May 2019 as Care Solutions Internal Sales Partner prior to transitioning into his current role. He brings ten years of insurance wholesaling experience to the position, including roles with Bankers Life & Casualty and Liberty Mutual Insurance. Prior to entering the insurance industry, he practiced law for fourteen years.

AJ holds a law degree from Indiana University School of Law and a bachelor's degree in Business Management from Indiana University Kelley School of Business.

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