

PROFESSIONAL BIO



HELPING FINANCIAL ADVISORS **HELP THEIR CLIENTS.**

BILL MEREDITH RELATIONSHIP MANAGER

Through his twenty-five years in Life Insurance and Wealth Management, Bill has achieved a comprehensive understanding of the needs and requirements of his advisors and how best to attain their client's goals. He constantly strives to improve his knowledge and insurance skills to best serve his advisors clients.

A graduate of Coastal Carolina University with a degree in Business and Finance, Bill is well versed in concepts of wealth transfer and executive benefits and has acquired comprehensive product knowledge that extends to life insurance concepts Annuities Long Term Care and Disability. Bill builds foundational relationships with elite financial advisors while understanding and respecting the relationship between the financial advisor and their client. He serves as a consultant, coach and relationship manager helping to simplify the process of selling insurance and protecting the assets of his advisors clients.

Bill has worked in the General Agency realm and also held sales roles with Security Life of Denver/ING, AIG, and Principal. In addition to his Life and Health license, Bill holds a Series 6 & 63 with FINRA.

An avid sports fan, Bill is supporter of the Kansas City Chiefs and Royals. He enjoys road cycling, and both plays and teaches tennis. Bill resides in Scottsdale, AZ.

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