CAPITAL STRATEGIES

CAPITAL STRATEGIES GROUP & GOLDSTEIN FINANCIAL GROUP JOIN FORCES WITH CHICAGO EXPANSION

AUGUST 10, 2022, CHICAGO, IL - Capital Strategies Group, Inc. is pleased to announce that it has joined forces with Goldstein Financial Group, LLC ("GFG"), an independent life insurance brokerage and consulting firm based in Chicago, Illinois. Capital Strategies is an M Financial affiliated insurance firm serving high-net-worth families and businesses throughout the Southeast and Midwest. Allan Goldstein, the Founder and Chief Executive Officer of GFG, is a seasoned life insurance industry entrepreneur with four decades of experience providing education and solutions for high-net-worth individuals and their advisors. In addition to Mr. Goldstein, Andrea Lechner, GFG's Director of New Business and Operations, with 20 years of service to its clients, will join Capital Strategies in its Chicago office.

"Working with Capital Strategies provides a natural succession plan for GFG, its clients, and the advisors with whom we work," stated Allan Goldstein. "We came to the decision to combine forces, bringing together the GFG relationships in our local market coupled with the depth and strength provided by Capital Strategies," he added. Mr. Goldstein is also a Principal of M Financial Group, the leading life insurance distribution, service, and product organization serving high-net-worth individuals, executives, and Fortune 1000 companies.

"Allan, who started his career in the actuarial field, has distinguished himself as an industry leader through his unique ability to bring an analytical approach to clients and advisors. This aptitude coupled with his established decades-long reputation in the Chicago market are invaluable. Allan and his team are a true asset for Capital Strategies," stated David F. Byers, Jr., J.D., LL.M, Managing Principal of Capital Strategies.

Throughout his career, Mr. Goldstein has been a featured speaker at leading industry events and to professional firms across the country. He has collaborated with trust and estate attorneys, wealth management firms, and trust companies. He has been published in the National Law Journal, Worth Magazine, and other publications.

With this alliance, Birmingham, Alabama-based Capital Strategies has further expanded its footprint into the Chicago market. In addition to Mr. Goldstein, Capital Strategies' expansion into Chicago will be led by Mr. Byers, T. Hudson Williams, J.D., LL.M., and William A. Worrell, Jr.

As Managing Principal of Capital Strategies, Mr. Byers is an expert in tax planning, with over 25 years of experience. He is past President of FINSECA (formerly the Association of Advanced Life Underwriters, AALU), and he currently serves as Chair of its Estate Tax Working Group. Mr. Byers also serves as Chairman of the Board of M Financial. He is a frequent speaker for estate planning and CLE courses involving tax, insurance, and estate planning issues, including the Notre Dame Tax Institute and the Tulane Estate Planning Institute. Mr. Byers has authored articles in various tax publications including Trusts & Estates Magazine.

As Tax Counsel for Capital Strategies, Mr. Williams works directly with clients' estate planning attorneys to tailor the funding and ownership of life insurance contracts on the most tax-efficient basis. He often speaks on current issues intersecting tax and life insurance, and he co-authored "Switch Dollar and the Power of Deferral," published in Trusts & Estates, with Mr. Byers and Lawrence Brody.

Mr. Worrell has been with Capital Strategies for over 23 years. As Senior Analyst, he specializes in working with wealth transfer clients. His areas of specialization include product design/analysis and economic modeling, along with managing and maintaining close client relationships. He holds the Series 7 and 63 securities licenses. He is a long-standing member of the Estate Planning Council of Birmingham.

For more information about Allan Goldstein, CLU, ChFC, RHU, please **read his biography here.**
For more information about Andrea Lechner, please **read her biography here.**
For more information about David F. Byers Jr., J.D., LL.M., please **read his biography here.**
For more information about T. Hudson Williams, J.D., LL.M., please **read his biography here.**
For more information about William A. Worrell, Jr., please **read his biography here.**

ABOUT CAPITAL STRATEGIES GROUP, INC.

Founded in 1989, Capital Strategies is a wealth preservation-focused insurance firm serving ultra-high-net-worth families and businesses. Through a concierge insurance experience, the firm specializes in helping to minimize income and estate-tax liabilities by planning tax-efficient insurance strategies, facilitating contract placement, and performing timely reviews. As a shareholder firm of M Financial Group, Capital Strategies provides proprietary, differentiated insurance strategies that feature preferential pricing, custom design, and greater protection for clients. For more information about Capital Strategies Group, please visit **www.CapitalStrategies.net.**

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