

GWE Newsletter

Spring 2014

Volume 9, Issue 2

THE HISTORY OF M

We frequently talk about our affiliation with M Financial and how that benefits our clients and advisors. We are very proud to be a Member firm of M Financial and wanted to share some of M's rich history with you.

1978 – Four insurance producers establishes a network of independent firms to provide customized insurance products for their clients. Security Life of Denver was the only company that agreed to produce the first proprietary product. These four producers all had the letter “M” in their names and were referred to as the “M Boys”.

1981 – M Financial Re is formed to reinsure life business written by M Member Firms

1983 – M forms a relationship with Pacific Life

1989 – M authors first ABA Primer on Life Insurance Due Care, establishing M as a leading client advocate

1993 – M hosts first National Advisors conference, the preeminent meeting for advisors of the ultra affluent

1996 – Carrier partner, John Hancock, offers first proprietary product

1997 – UNUM offers first proprietary disability product

2000 – M introduces private placement product, Magnastar

2006 – M annual life sales top \$1 billion for the first time

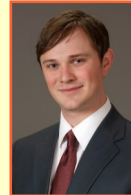
2007 – M annual sales top \$2 billion for the first time

2010 – M authors the Advisors Guide to Life Insurance solidifying M's position as the leading client advocate

2011 – M forms a relationship with TIAA-CREF Life Insurance Company

For 36 years, M has earned the reputation as the leading client advocate in the life insurance industry. As we represent our clients to the market, our membership with M Financial allows us to provide the best advice, products and services available.

HAVE YOU MET BEN BLEUSTEIN?



Ben began his career in the insurance industry as a Sales Support Associate for M Financial Group. During his time at M Financial, Ben developed in-depth knowledge of the applications of life insurance and annuity products. He also utilized advanced design techniques and analyzed insurance market trends to tailor the design of business, estate planning, and individual cases to the needs of clients for over 130 Member Firms.

At GWE, Ben is eager to use his experiences to help out clients meet their objectives through implementation of productive strategies, both standard and creative. His experience in analyzing hundreds of scenarios involving dozens of different products and product types will allow him to assess which products may be best suited for our clients.

Ben grew up in Baltimore and currently resides in the District of Columbia. In his free time, Ben enjoys playing tennis, spending time with his fiancée and puppy, and is an avid sports fan.

GWE'S NEW OFFICE ADMINISTRATOR



Nicole Calaro has been promoted to Office Administrator. She joined GWE last year as our Administrative & Marketing Assistant. In addition to her previous duties, her new responsibilities include maintaining our internal office operations and managing our IT.

DAVID WEXLER, THE “PROFESSOR” & SINGER



In our office, we sometimes refer to David as the “Professor” because he loves to conduct meetings using the white board and color markers. On March 5, 2014, David was a guest lecturer at the Georgetown University Law Center for the LLM class on estate planning. He spoke to the class on life insurance basics and life insurance as part of the estate plan.

David is also a member of the Singing Capital Chorus, a men's a cappella singing group that performs in the greater Washington Community. Over the last year, the Singing Capital Chorus performed the “Star Spangled Banner” at a Nationals baseball game and the Great Washington Association of Insurance and Financial Advisors' Legacy Awards luncheon.

Greenberg, Wexler & Eig, LLC

(301) 656-0660 · 7316 Wisconsin Avenue, Suite 230, Bethesda, MD 20814 · www.gwellc.com

Securities Offered Through M Holdings Securities, Inc. A Registered Broker/Dealer, Member FINRA/SIPC. Greenberg, Wexler & Eig, LLC is independently owned and operated. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is provided with the understanding that Greenberg, Wexler & Eig, LLC does not engage in the practice of law, or give legal or accounting advice. For advice in legal, accounting matters that arise from this presentation, please consult your other professional advisors. To ensure compliance with requirements imposed by the IRS, we inform you that any U.S. federal tax advice contained in this document is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code, or (ii) promoting, marketing, or recommending to another party any transaction or matter that is contained in this document.

GREENBERG
& WEXLER
EIG