

# Meet Ronnie Hamilton, Senior Vice President of Advanced Markets



**Ronnie Hamilton**  
**CFP, CLU, ChFC, AEP**  
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## **Background:**

Ronnie is a highly skilled and detail-oriented Advanced Sales Consultant with over 30 years in the financial services industry. Proficient in analyzing client situations and designing customized solutions for high-net-worth clients and business owners.

Subject matter expert on all types of insurance products and their benefits. Proven ability to build trusted and lasting relationships with financial advisors and internal team members. Extensive knowledge of business succession, executive compensation, wealth transfer, and estate planning strategies.

## • **Professional Experience:**

- Concourse Financial Group/First Protective Insurance Group, he served as their Advanced Sales Consultant. As a life insurance specialist, Ronnie designed tailored insurance solutions by thoroughly reviewing case details, assessing various carrier and plan options, and presenting appropriate recommendations supported by illustrations and marketing materials. Ronnie focused on delivering timely responses and finding practical, saleable solutions when working on complex cases. Additionally, he supported advisors, Regional Directors, and internal teams by assisting with case design and product recommendations and addressing general inquiries related to clients' circumstances.

- **Skills:** Advanced life insurance sales strategies involve specialized business, estate, tax, and retirement planning techniques. Professionals must excel in product assessment, needs analysis, and policy customization. Key skills include tax-efficient planning, collaboration with financial experts, and proficiency in insurance software. These competencies enable the creation of comprehensive, tailored solutions for clients' complex financial needs.

- **Education and Licenses:** Ronnie has a bachelor's degree in Accounting and Business Administration from Birmingham-Southern College. Certified Financial Planner (CFP), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Accredited Estate Planner (AEP), Life and Health Insurance Licenses, and Series 6 and 63.

## **About Ronnie**

Ronnie lives in Birmingham, AL, with his wife, Ann. We enjoy spending time with our six grandchildren and visiting the Gulf Coast and the lake. He is an avid golfer and a huge sports fan, especially Alabama football and basketball - Roll Tide!