

Terry McPartland

TM

General Manager, Investment Professional, Series 6, 63, 7, 24 and Ins. License #65092
Phone: 801-792-1875

Summary of Experience

For the last 40 years, Terry McPartland has led hundreds of sales agents working with thousands of clients to help create success. From this experience, Terry witnessed the real results of many products and strategies; where they fail, and where they succeed. He learned that “how” a product is used is the most important part of any plan and that no one type of advisor has all the answers. Now, he and his team of specialists work together implementing the successful strategies that have helped create the most significant and consistent results for clients.

Experience

| | | |
|---|--------------------------------|------------------------|
| The McPartland Group | President | 2012 to Present |
| Comprehensive Financial Services, focusing on cash flow distribution strategies for retirees. The Holistic Team Approach covers Income, Taxes, Allocation, and Legacy Planning. Our focus on strategies, rather than products, a team instead of an individual approach, helps clients achieve their goals. | | |
| Over 3500+ clients in 18 states | High Customer persistency rate | |
| Guardian Life / Park Ave Securities | General Agent | 1997 to 2012 |
| Directed Recruiting, Training, and Production for Utah with 5 offices throughout the state Grew the agency from 0 to over 75 agents putting it in the Top 5 agencies in the Western US Served on the Field Advisory Board | | |
| Northwestern Mutual / Robert W Baird Investments | General Agent | 1987 to 1997 |
| Directed Recruiting, Training, and Production for Utah & Nevada Increased Life, Disability, and Investment premiums Grew the sales team to over 100 and achieved over 1 billion in production | | |
| Northwestern Mutual / Robert W Baird Investments | District Agent | 1983 to 1987 |
| Co-Founded Wenatchee, WA District Agency – Became top producing district agency in the West | | |
| Northwestern Mutual / Robert W Baird Investments | Agent | 1979 to 1983 |
| Achieved Bronze, Silver, and Gold Sales Awards placing him at the top 5% to receive all 3 awards consecutively | | |
| Northwestern Mutual | College Intern | 1976 to 1979 |
| Rated in “Top 10 College Interns” for two years | | |

Education

Washington State University

1975 to 1979

Graduated with a BA degree in history, a minor in Political Science, and a degree in Finance

Career Achievements

- General Agent for two of the top 5 mutual companies in the US
- Centurion Award, Top Disability Producer, Wall of Fame,
- Field Advisor Board Member at Guardian
- Member of Million Dollar Round Table
- Former Secretary of NAIFA (National Association of Insurance and Financial Advisors)
- Frequent speaker on financial planning, insurance, annuities, and investment strategies

Hobbies & Interests

Terry has been married to his wife LuAnne for over 40 years and they share seven children and several grandchildren. Mostly Terry loves being with family and friends. His interests include golf, skiing, college football, hiking, and reading. Terry loves history with a special focus on Frontier history. You can often find him planning road trips to catch every historical site of significance along the way and him often already knowing the history as well as the tour guides.

Personal Strengths

Terry is an **optimist**. He can help people see positive possibilities under difficult circumstances.

Terry is a great **conversationalist**. He is easy to talk to and has a really enjoyable personality.

Terry has **vision** of the future and the drive to make it a reality.

-Greg Black

Terry is **genuine**. He really desires to help people achieve meaningful and long lasting success.

Terry makes complex issues **simple** by his masterful use of analogies and stories.

-Ryan Clark