

**TIMOTHY J. DEMPSEY, CLU, ChFC**



**RESUME**

**PROFESSIONAL SPECIALTIES:**

- Wealth Protection Strategies
- Estate and Tax Planning
- Employee Benefit Plans and Pensions
- Executive Compensation
- Planning for over funded and fully funded Retirement Plans
- Business Life Insurance
- Life Settlements
- Bank Owned Life Insurance (BOLI)

**QUALIFICATIONS:**

- BS Clarkson University
- MBA University of Chicago
- Chartered Financial Consultant (ChFC) the American College
- Chartered Life Underwriter (CLU) the American College
- Licensed Agent - Life and Health Insurance
- Registered Representative - Investments
- 15 year's experience in manufacturing companies, including operating positions

**PERSONAL:**

- Past Chairman - Youth Conservation Corps of Lake County
- Past Chairman - Lake County Workforce Investment Board
- Board Member - The National Association of Workforce Boards
- Member - Lake County Forest Preserve Partnership Council
- Board Member - Libertyville Sunrise Rotary Club
- Past President - Hinsdale Gateway Rotary Club
- Past Vice-President - Chicago Chapter - Society of Financial Service Professionals
- Registered Representative: Sagepoint, Inc. Member NASD/SIPC

**PHILOSOPHY:**

“I believe that my responsibility lies first and foremost with the needs of my clients. When I recommend a course of action, or provide service, it is with the same dedication, honesty and integrity that I apply to myself.”