DARNALL SIKES
WEALTH PARTNERS

Reinsurance Solutions for Automotive, RV & Furniture Dealers

TAX-SMART REINSURANCE SOLUTIONS

Tax-Smart Reinsurance Solutions for Automotive, RV and Furniture Dealers

At Darnall Sikes Wealth Partners, our extensive experience working with reinsurance companies allows us to provide automotive, RV and furniture dealers with institutional-quality, tax-optimized solutions for managing wealth within their reinsurance companies.

Key benefits include:

- **Account set-up within 24 hours of receiving signed paperwork**
- **Experienced advisors investing required warranty reserves per your Investment Policy Statement**
- **Access to a securities-backed line of credit that uses your reinsurance surplus account as collateral**
- **Credentialed, independent reinsurance specialists who serve only your interests**
- **24/7 online account access and performance reporting**
- **High-quality, responsive service for dealers and their agents**

Our specialized reinsurance program provides dealers with a solution to their diversification dilemma on income earned through the sale of warranties and other ancillary products at the point of sale. In addition, we offer our clients flexibility in creating surplus accounts where owners' premiums can be transferred after they are earned out. This dynamic offering provides the dealer with hassle-free management, flexibility and greater control.

A RESPECTED LEADER IN REINSURANCE SOLUTIONS

We've been helping dealers and their agents with reinsurance solutions for nearly a decade, and we currently work with nearly 300 dealers nationwide. Unlike some other reinsurance investment programs, we proactively consult with our reinsurance clients to plan for their cash flow needs and long-term wealth accumulation goals, paying careful attention to any tax implications.

When you work with the Darnall Sikes Wealth Partners reinsurance team, you benefit from the operational efficiencies and processes of our broker-dealer Avantax Wealth Management, a premier partner to professional CPA wealth management firms across the United States. With over $76 billion* in assets under administration, our broker-dealer's thousands of experienced financial professionals deliver industry-leading resources to its partners.

To learn more or to start the discussion, please contact us.

**as of Sep. 2021*

Our Professionals Are Highly Experienced in Reinsurance Solutions ... and Much More

Jed Inzerella, CFP®, RFC

Financial Advisor | NEW IBERIA
jedi@darnallsikeswealth.com

Jed Inzerella has spearheaded Darnall Sikes Wealth Partners' entry into the reinsurance investment business. Under his leadership, what began as consulting a single client has expanded into a thriving, specialized niche serving nearly 300 automobile, RV and furniture dealers nationwide. Jed is a CERTIFIED FINANCIAL PLANNER® and Registered Financial Consultant. He has been recognized by our firm's broker-dealer, Avantax Wealth Management, with the coveted Challenger Award, which honors Jed's success in advancing the field of wealth management and financial planning. He focuses on developing new business and is the primary relationship manager for our reinsurance program administrators, agents, and clients in addition to serving individuals' wealth management needs.

Terrance J. Keenan, Jr., JD

Financial Advisor | NEW IBERIA
terryk@darnallsikeswealth.com

Terry Keenan – along with his wife Michelle – is a critical member of our reinsurance team who services clients' day-to-day needs. He ensures investments are placed appropriately and continually managed to support clients' financial goals. Terry's extensive background in legal and business consulting gives him unique insight into companies' opportunities and challenges. He consulted with Fortune 500 clients during his time at Accenture before joining a Seattle-based law firm focused on real estate, bankruptcy and creditors' rights. After realizing his passion for financial planning, he earned his Series 7 and 66 certifications and joined Darnall Sikes Wealth Partners in 2015.

Michelle Keenan, MBA

COO, Financial Advisor | NEW IBERIA
michellek@darnallsikeswealth.com

Michelle Keenan and her husband, Terry, support the firm's reinsurance clients nationwide. Together, they service the daily needs of all reinsurance clients, ensuring reinsurance investments are managed according to clients' financial goals and trustees' Investment Policy Statements. Michelle has built her career on helping businesses solve problems. After receiving a bachelor's degree in mechanical engineering and an MBA in finance, Michelle advised Fortune 500 clients as an Accenture software consultant. For the next 11 years, she worked for Microsoft where she was instrumental in scaling a highly successful new business unit. She joined Darnall Sikes Wealth Partners in 2015 and serves as COO in addition to servicing reinsurance clients as a financial advisor.

A Firm at the Top of our Field

Darnall Sikes Wealth Partners provides comprehensive financial advice and investment management services to business owners and their families – especially those that rely on reinsurance solutions to protect their bottom line.

We were born out of an accounting firm, a heritage that allows us to provide comprehensive, tax-optimized advice and services. Our full team comprises 30 professionals, including CPAs, MBAs and an attorney — and also, more CERTIFIED FINANCIAL PLANNER™ professionals than many other firms in our field. Collectively, we have more than 150 years of tax and financial advisory experience, and our broad array of disciplines allows us to provide comprehensive insights and tax-optimized financial advice.

Since 2007, we have been the top-producing wealth management firm with more than $1 billion** in assets under management in a nationwide network of more than 400 CPA wealth management firms. Strengthening and informing our approach is a close partnership with our broker-dealer, Avantax Wealth Management, which gives us access to a rich set of resources and deep expertise that we leverage on behalf of our clients.

In addition to specialized insight into the complex world of reinsurance, we also provide guidance on a range of other critical matters, from financial planning and management of investments to comprehensive guidance in designing and implementing employee retirement plans. Equally important to our clients is the fact that we are entirely independent, and motivated only by their best interests.

We're eager to learn about your financial concerns and questions. Please contact us to begin the discussion.

***as of May 2021*

Trusted Financial Services and Advice for a Range of Needs

INVESTMENTS

A disciplined, long-term approach to positioning and managing your investments to minimize tax liabilities. We leverage our own specialized expertise, plus the advanced research of Avantax, our broker-dealer.

EMPLOYER-SPONSORED RETIREMENT PLANS

Guidance designing and implementing customized, tax-deferred and easy-to-navigate retirement plans of all types. Whether you're looking for an unbiased review of your company's existing employee retirement plan, or creating a new retirement plan from scratch, we can help.

FINANCIAL PLANNING

Expert decision-making support, tailored to your needs, on all financial matters. We help you set goals, create a comprehensive plan, track performance and make periodic strategic adjustments to your financial plan.

INSURANCE

Unbiased, tax-centric advice on life, long-term care and disability coverage. To provide you with greater value and coverage that meets your specific needs, we offer access to a select network of trusted insurance carriers.

TAX MANAGEMENT

Help in taking every advantage the law allows for minimizing the taxes you owe. Our expertise in both investment and tax accounting makes us uniquely positioned to provide tax management advice and services.

BUSINESS CONSULTING

Advising business owners on how to optimize the long-term financial health of the business at every stage of ownership. We also coordinate the work of attorneys, CPAs, and other professionals working on your team to achieve your financial goals.

RETIREMENT PLANNING

Comprehensive investment planning for retirement that optimizes your long-term business, personal and family wealth. We help you realize your vision for retirement — for yourself, your family, and even your employees.

LEGACY PLANNING

Guidance on how to pass your wealth on to your heirs and, if desired, leaving a lasting impact on a broader scale as well. We also advise on estate planning, and coordinate with attorneys on wills and other legal documents.

DARNALL SIKES
WEALTH PARTNERS

LOCATIONS

New Iberia
1101 East Admiral Doyle Drive, Suite 106
New Iberia, LA 70560
Phone: 337-359-4379

Lafayette
2000 Kaliste Saloom Road, Suite 300
Lafayette, LA 70508
Phone: 337-237-0112

Morgan City
1201 Brashear Avenue, Suite 301
Morgan City, LA 70380
Phone: 985-384-6264

Eunice
1231 East Laurel Avenue
Eunice, LA 70535
Phone: 337-457-4146

darnallsikeswealth.com

TAX-SMART REINSURANCE SOLUTIONS