

Education, Experience and Professional Credentials



Troy A. Dyer

Former Senior Manager, Harris Bank and Trust Company, Chicago, IL
Former Strategic Alliance Manager, Bank of Montreal, Toronto, Canada
Former Brokerage Representative, *NASD* and *SEC*, Washington DC
Consultant to Mortgage and Insurance *NMOs* and *L&H* brokerage firms
Past Principal Member, *First Financial Resources, LLC* Harrisburg, PA
Co-Founder, *Wealth Preservation Institute, LLC*, Beverly Hills, CA
President and CEO, *Dyer Financial, Inc.*, *DyerData*, Lake Geneva, WI
Managing Member, *Advanced Wealth Advisors, LLC*, Lake Forest, IL
University of Southern California, Cinema-Television, Los Angeles, CA
University of Wisconsin Madison, Communications/English, Madison, WI
Approved Member, of the National Ethics Bureau (NEB), San Diego, CA

Troy A. Dyer Specializes In: COLI & BOLI, Executive Benefits, Business Succession Plans, Buy-Sell Plans, Capital Gain Avoidance Plans, Deferred Compensation Plans, Fixed-Rate Investment Plans, Personal Pension Plans, S&P 500 Indexed Plans, Supplemental Security Plans, Severance Benefits, Tax-Deferred Indexed Products and CAIC Design and Risk Management.

Public Speaking for Associations, known for Multi-Media

This is a partial list of organizations, institutions and associations.

BUSINESS ORGANIZATIONS

National Automobile Dealers Association

Top 10 Group (luxury car sales)

National Association of Metal Heat Treating

Regional and National Meetings

Young Presidents Organization

Regional and National Affiliations

CHARITABLE INSTITUTIONS

American Red Cross

Regional (Chicago, Palm Springs, Boca, etc.)

The United Way

Regional (New York, San Francisco, Los Angeles)

PROFESSIONAL PEER GROUPS

The Million Dollar Round Table

Top of the Table (main platform)

The International Forum

Top Financial Planning Professionals Worldwide

Advanced Association of Life Underwriters

Washington D.C. watch group for the U.S. Insurance Industry