Paul Yates, CLU, FSA

Vice President
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Paul Yates is Vice President at Cohn Financial Group and has over 25 years of experience in the life insurance industry. In his current role, Paul works with high net worth individuals, businesses, and their advisors to design and implement sophisticated life insurance plans. He is one of a small number of life insurance professionals nationally that has extensive experience in the planning, design, and implementation of private placement life insurance (PPLI).

He is an actuary by background and has spent the majority of his career devoted to the ultra-affluent market in various capacities, including life insurance planning, insurance company and product due care, reinsurance, and life insurance product pricing and in-force management.

Prior to joining Cohn Financial Group, Paul served as Director of Product Management and Sales Support for M Financial Group, a leading financial services design and distribution company comprised of more than 125 independent Member Firms, including Cohn Financial Group. During his time at M Financial, Paul supported M Member Firms and their clients by providing financial and product due care, competitive intelligence, and support for both product design and advanced planning. Paul also served as a contributing editor to *The Advisor's Guide to Life Insurance*, published by the American Bar Association's Section of Real Property, Trust and Estate Law.

Paul is a Fellow in the Society of Actuaries (FSA) and holds the CLU designation. He serves on several Boards including JDRF (Arizona Chapter), Gen Next (Phoenix Chapter), Arizona Community Foundation (Professional Advisors Board), and is a past President of Valley Estate Planners. Paul earned a BS in statistics from Brigham Young University.

About Cohn Financial Group

Cohn Financial Group, formed in 1987, has been a Member Firm and shareholder of M Financial Group since 1990. M Financial is the largest insurance buying syndicate in the U.S. with over $2 billion of annual revenue from its Member Firms.

Cohn Financial Group's national practice is primarily (1) customized private placement life insurance and annuity transactions, (2) complex life insurance solutions for high net worth individuals and family offices, (3) non-qualified plan funding strategies, and (4) market studies and consulting projects.

Cohn Financial Group's 18-person staff includes Actuaries, Chartered Financial Consultants and senior industry professionals.

Cohn Financial Group is a Division of Gallagher (Arthur J. Gallagher & Co.).

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