



## NORTHEAST BROKERAGE

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### Gregory Douglas, CAP®

Chartered Advisor in Philanthropy®  
Estate & Business Planning

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**Greg Douglas** is an Estate and Business Planning professional at Northeast Brokerage who has over 24 years of experience in the financial services industry. Greg started his career as a fee-based financial planner at Cigna Financial Advisors and also held Sales Vice President positions at The Hartford and Capitas Financial. Greg's focus has been in the HNW and business owner markets with advisors of private banks of Fortune 100 banks, national and regional accounting firms, major Wall Street brokerage companies and employee benefits firms.

#### Educational Designations/Licenses

Greg has the Chartered Advisor in Philanthropy (CAP®) credential from The American College and is currently enrolled in coursework for The Chartered Financial Consultant (ChFC) and Certified Financial Planner (CFP) credentials. He is a member of The Planned Giving Group of CT, The Gift Planning Group of Northeast NY, New England Association

for Healthcare Philanthropy, and The Partnership for Philanthropy Planning. Greg holds his Series 6, 63, and 65 licenses and represents insurance companies with life insurance, long-term care, and disability product solutions.

#### Personal Statement

Greg and his wife Marilyn reside in Simsbury, CT and enjoy volunteering with their Bassador (Beau) in the area of pet-assisted therapy inside a variety of local hospitals and medical facilities, with children involved in the R.E.A.D. Program at local schools and libraries, and with different Veterans organizations.