



NORTHEAST BROKERAGE

Life | Annuity | LTC | DI



Jeff Bell, CLU, ChFC, RHU, LLIF

Estate and Business Planning Specialist

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Jeff Bell is an Estate and Business Planning professional at Northeast Brokerage who has over 35 years of experience in the financial services industry focusing on individuals, business owners and multi-generational planning. Jeff has held leadership positions at UNUM, Northwestern Mutual and Hartford Life. He was an Estate and Insurance Planning Specialist at Smith Barney and a leading Sales Vice President at Capitas Financial.

Jeff's focus has been in the "high net worth" and business owner markets with advisors of Private Trust Companies, National and Regional Brokerage Companies, RIA's and Life Insurance Professionals.

He has performed an integral role in the planning and placement of life insurance with highly successful individuals and businesses, professional sports team owners, professional athletes, private equity and hedge fund partners, and top movie producers. His approach is to focus on the client's planning needs and to work in a collegial fashion with the client's advisory team.

Jeff also works with individuals in the area of Structured Settlements and Private Placement Products. He has access to a wide range of insurance carriers and products including life insurance, disability insurance, long term care, life settlements and high limit coverage through Lloyd's of London.

Educational Designations/Licenses

Jeff has his Chartered Life underwriter (CLU), Chartered Financial Consultant (ChFC), Registered Health Underwriter (RHU) and is a Fellow of the LIMRA Leadership Institute (LLIF). He has his Series 6, 26 and 63 licenses. Additionally, he has held board positions in industry associations at both the local and national level.

Jeff graduated from Portland State University, Portland, Oregon with a degree in Business Administration.

Personal Statement

Jeff and his wife Denise live in Simsbury, CT with their Labrador retriever, Lily and volunteer on a regular basis preparing and serving meals for a homeless shelter in Hartford. For many years, Jeff led youth in "Rebuilding Together", a project focused on construction and home improvements for individuals in marginalized areas in Hartford. Following Hurricane Katrina, Jeff traveled to Biloxi, MS to work with homeowners to repair the damage to their homes from that storm.

Jeff is a veteran of the US Navy and supports programs to honor and provide services to veterans. He achieved the rank of Eagle Scout and enjoys supporting young people striving to do the same. He has traveled extensively through Asia, Europe and the United States. In his leisure time, Jeff enjoys hiking, biking, kayaking, gourmet cooking, reading and spending time with family.