

The Financial Planning Division

An Office of MetLife



Marc A. Gallo, CASL®

Marc joined the Financial Planning Division, an office of MetLife, in Late 2001. His practice has developed from assisting clients with their long-term care insurance needs to comprehensive financial planning. "I had clients who were getting advice from their CPA, attorney, and their broker. I feel there is a lot of overlap in these three disciplines. What I found is that the vast majority of people are looking for an adviser to bring together all of this. They want someone who can work with their professionals and ultimately provide them with a comprehensive financial plan which is both practical and useable." Marc then took this experience to the airwaves. He co-hosts "Your Family Matters" Saturday's at 12:00 p.m. on KCBQ AM 1170.

Many of Marc's clients are high-income-tax-bracket professionals, executives, and business owners of various industries. "One of the benefits of my diverse client base is that I am involved in many different situations where I help to plan and protect my clients' financial future." Marc is a Financial Adviser and a Financial Planner with MetLife Securities Inc. Marc's areas of focus include:

- Comprehensive Financial Planning
- Tax Planning*
- Insurance Planning
- Estate Planning
- Fee-Based Asset Management Accounts
- Selective Benefits Plans for Business Owners and Key Employees
- Long-Term Care Insurance

Marc has over 13 years of experience, has been a featured seminar speaker on planning techniques and, also many venues as part of his role on KCBQ and KPRZ radio. He is registered representative of MetLife Securities Inc. servicing individuals and businesses in California.

Marc A. Gallo

Financial Planner

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