PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Lacy Walthall CLU®, ChFC®

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Background & Experience

Lacy Walthall has a career that has spanned four decades in the insurance industry serving the complex insurance needs of more than 1,000 ultra-high net worth clients throughout the southeast. Lacy's extensive point-of-sale life insurance experience allows him to add significant value as a consultative insurance planning resource offering accurate, concise, and objective analysis of existing coverage as well as creative utilization strategies that are customized to specifically address a client's objectives, concerns, and goals. Life insurance is a one-of-a-kind financial product with its own, unique tax treatment. Lacy often refers to life insurance as the Swiss Army Knife of financial products with traditional needs-based applications and non-traditional "utilizations" that seek to create tax-favored living benefits or Long-Term Care risk mitigation for certain clients. Whether you're looking for Wealth Preservation, Executive Deferred Compensation, Tax Advantage Supplemental Retirement Strategies, Long-Term Care Risk Mitigation, ILIT Trustee and Fiduciary Product Monitoring Support, Policy Performance Audit & Analysis, or Business Continuity & Succession Planning Lacy has successfully already helped his clients reach their goals and can help you.

Certifications & Education

- Chartered Financial Consultant, ChFC®
- Chartered Life Underwriter, CLU®
- North Carolina State University - Raleigh, NC
  Bachelor of Science, Economics