



## **Luke Kaplan**

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### **Background & Experience**

Luke possesses a diverse insurance planning and consulting background. He started his career at Arthur J. Gallagher & Co., where he specialized in risk management alternatives for middle market corporations. He then joined American Business & Professional Program, a boutique life insurance and estate planning firm. His life insurance production led him to a management position in Credit Suisse's Longevity Markets Group; where he went on to lead the national sales team. Before rejoining Gallagher as a leader in its life insurance practice, Luke started and ran an advanced life insurance planning agency catered to assisting financial services professionals with the life insurance portion of their clients' financial and estate plan.

Luke enjoys spending his spare time with his wife Isabel and three children. Luke holds a FINRA Series 7 and 63 as well as a life and health license.

### **Certifications & Education**

- Boston College, Chestnut Hill, Massachusetts - BS, Marketing from the Carroll School of Management