PLAN
PROFESSIONAL LIFE ADVISORS NETWORK


**Mark Jeffrey Rowe, CLU®, ChFC®**

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**Background & Experience**

Mark is a recognized expert in estate planning, wealth transfer, business continuation planning, and a true point-of-sale specialist. His career began in 1978 with Massachusetts Mutual Life in Detroit, and he eventually transitioned into agency management with John Hancock. In 1997, he moved to California and opened several insurance agencies and a broker-dealer, working with independent financial advisors and property-casualty producers.

In 2012, Mark began working with the top Raymond James and Morgan Stanley advisors along the West Coast, with a mission to provide them with reliable and comprehensive support for cutting-edge knowledge and expertise in insurance solutions and services. In 2017, he joined Wells Fargo as a Wealth Insurance Specialist, and in 2019, he became affiliated with PLAN and BGA Insurance.

Mark regularly meets with advisors and their clients to fully understand their goals. He coordinates with their entire team of professionals to help prepare a comprehensive plan involving financial, tax, legal, and insurance solutions. Mark's approach is twofold: first to fully evaluate the specifics of a client's financial situation and then offer sound recommendations to assist them in making better financial decisions.

Mark provides holistic, consultative planning suggestions while structuring proposals with maximum flexibility. This ensures that clients maintain control over their net worth with clear and understandable solutions.

**Certifications & Education**

- Michigan State University, East Lansing, MI - B.A., Risk Management and Insurance