



Tim Whitmore, CLU®, CFS®, ChFC®

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Background & Experience

A nationally recognized member of the life insurance industry with a specialty in business and estate planning. Tim Whitmore has been involved in the business for nearly three decades in several different roles. Over his career he has won numerous awards and has been recognized as a top producer.

Tim, a graduate with honors from the University of Laverne with a Bachelor of Science in Organizational Management, entered the life insurance industry in 1995. In 2001, he obtained his CLU and ChFC from the American College and his CFS and BCE that year from the Institute of Business and Finance.

With more than two decades of experience in advanced planning and premium financing, Tim helped design life insurance products for two carriers and led Premium Financing Department for Pacific Life, located in Newport Beach, Calif.

Tim is also an experienced presenter, having traveled to several cities throughout the country hosting advanced sales concepts presentations for life insurance agents, CPAs, RIAs and attorneys with high-net-worth clientele.

As an integral part of the Watermark Life planning team, Tim supports his advisors by providing back-office case design, as well as point of sale services.

Tim splits his time between Scottsdale, AZ and Westlake Village, CA. He loves spending time with his two children. In his free time, Tim is an avid mountain bike rider, soccer player and frequents outdoor gun ranges.

Certifications & Education

- Chartered Life Underwriter, CLU®
- Certified Fund Specialist, CFS®
- Chartered Financial Consultant ChFC®