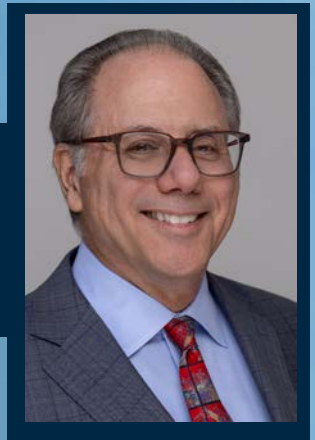


Mark Rosen, CLU

President, Underwriters Brokerage Service

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▼ Biography

As President of Underwriters Brokerage Service, Mark works closely with independent insurance advisors and insurance agents, assisting them with insurance-based risk management solutions for individuals and businesses. This includes a variety of legacy, estate, and business planning needs.

Mark specializes in a consultative process to assist in the areas of personal, estate, business, and charitable planning. He also brings additional expertise to assist with the review and analysis of existing insurance policies.

Mark is a founding Partner and past Chairman of the Board of LIBRA Insurance Partners, the nation's leading independent life insurance distribution and marketing organization. In addition, he is Past Chairman of NAILBA, (National Association of Independent Life Brokerage Agencies), and past President of the industry study group LIFE, Inc.

Mark has served on the Board of several local industry associations including NAIFA and SFSP, and is a member of the Estate Planning Council, the Society of Financial Service Professionals, and PLAN (Professional Life Advisors Network).

▼ Experience

- Legacy Planning
- Policy Audit and Review
- Long Term Care Planning
- Wealth Transfer Planning
- Business Succession Planning
- Employee Retention Strategies

▼ About Underwriters Brokerage Service

Since 1970, Underwriters Brokerage Service has focused exclusively on serving the needs of financial service professionals. That focus has helped us grow to become the region's leading independent insurance wholesale brokerage firm for Life Insurance, Long Term Care and Annuities. We partner with a wide range of financial service professionals including Life Insurance Professionals, Financial Advisors and Property Casualty Agents.

Support for competitive case needs includes low cost guaranteed protection, estate and business planning (including assistance at point-of-sale), and niche product opportunities. In addition, our impaired risk expertise enables us to accommodate many of your most difficult impaired risk clients.