

# Centura Wealth

Raleigh Watson  
MLL

- had been at Alliance Bernstein (AB)
- one year at Centura ; lives in San Diego
- at AB, extensive travel (40 weeks per year)
- responsible for building strategic partnerships
- differentiation : strategic income tax planning
  - 1) issue #1 - not getting great tax advice. Compliance - yes ; Strategic - no.
  - 2) close the professional coordination gap.

## Next Step:

- identified cases
- walk Derek through PPLI Deep Dive

- 65% of referrals to Centura come from the clients' other professionals. Balance from satisfied clients.
- If cannot give a client 5x Centura's fees in tax savings, won't take them on.
- Derek + Michael Bahkarian are tight. Derek already has expertise w/ PPLI - including PPLT call option