

A photograph of a middle-aged couple walking barefoot on a sandy beach. The woman is on the left, wearing a bright pink tank top and light pink trousers. The man is on the right, wearing a white button-down shirt and light grey trousers. They are holding hands and smiling at each other. The ocean is in the background with gentle waves breaking on the shore. The sky is a clear, pale blue.

CSP CAPITAL
SYNERGY PARTNERS



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001

Capital Synergy Partners

Comprehensive.

Leveraged Resources.

Capital Synergy Partners (CSP) was founded to help financial representatives and their clients capitalize on the synergy between the securities and life insurance industries. More than that, the CSP business model departs from the typical proprietary products base and its inherent conflicts of interest.

002

Capital Synergy Partners



Clear Vision.

Experienced, independent life insurance professionals with comprehensive investment service capabilities meeting the financial needs and objectives of high net worth individuals and closely held businesses.

003

Capital Synergy Partners

Cultivated Success.

In the securities and life insurance industries, proprietary products and sales quotas have been known to obscure business focus.

At CSP, our business focus is clear. We help financial professionals succeed by offering a full spectrum of professional services, general securities, direct placement investments, registered investment advisory services, life insurance, annuities and long term care offerings. Think of us as your gatekeeper to the best products, services and expertise in the industry.

004

Capital Synergy Partners



Core Values.

005

Capital Synergy Partners

The Pillars of Our Success.

Integrity

The professional respect and the trust we've earned is a reflection of our code of conduct.

Loyalty

Our business is based on our dedication to building and growing relationships for mutual success.

Excellence

Our goal is excellence; we strive to surpass expectations in every aspect of our business.

Passion

Our inspiration and rewards come from helping our registered representatives focus on creating success—for their clients and for themselves.

Capital Synergy Partners is dedicated to building and strengthening the independent practices of established life insurance and financial planning professionals, enabling them to secure and manage the assets of high net worth clients.

006

Capital Synergy Partners



Client Centered.

Results Driven.

It's more important than ever to offer clients the insights and smart strategies that help them achieve their financial goals. At CSP, we make it our business to empower our registered representatives to be client centered. With our vast resources at your service, your clients will appreciate your objectivity, dedication and expertise as you help secure their financial futures.



Competitive.

Advantage.

The competition for high net worth clients is fierce. CSP provides the competitive advantages you need to succeed. Underlying our winning synergistic approach, comprehensive resources, flexibility and responsiveness is a spirit of true partnership. We cultivate success as we build relationships with our registered representatives and they build relationships with their clients.

We invite you to grow your practice with us and capitalize on the synergy of shared success.

Competitive offerings and professional services position our financial professionals and their clients for success.



Choice.

Opportunities.

In this information age, clients are looking for more options and better choices. Financial professionals must be able to offer their clients a complete array of smart investment and life insurance options. Depend on CSP for choice investment opportunities and services to help you build your business.



Offerings.

Premium Products and Services.

At CSP, we serve our registered representatives with an unbiased, comprehensive portfolio of choice mutual funds, annuity carriers and direct placement offerings.

Over 50 Annuities

- Variable Annuities
- Equity Indexed Annuities

Over 30 Life Insurance Carriers

- VUL Carriers
- Life Settlements

Mutual Funds

- Approved Products

Direct Placement

- Real Estate
- Equipment Leasing
- Energy: Oil, Gas and Alternative

Money Managers

- Approved Money Managers

Securities

- General Securities Trading

A wide-angle photograph of a lighthouse situated on a rocky coastline. The lighthouse is white with a black top section and a glowing light. To its right is a large, white, two-story house with a dark roof. The foreground is filled with dark, jagged rocks. The ocean is calm, and a small sailboat is visible in the distance. The sky is a mix of orange, pink, and purple, indicating sunset or sunrise.

Security.

Peace of Mind.

At CSP, we have dedicated specialists to support all of our product offerings. You have the peace of mind knowing that you can rely on us for expert guidance every step of the way.

We help build security for our financial representatives and their clients.

The Guidance to Excel.

Bill Rapp, MBA
President
Registered Investment Advisor
Series 6, 63, 7, 24 and 51 securities registrations

Working with high net worth individuals and closely held businesses since 1980, Bill Rapp has a proven track record of leadership in the securities and life insurance industries.

Kathy Nicholas
Operations Manager
Series 7 and 24 securities registrations

Kathy Nicholas has been the Operations Manager at CSP since 1999. She has over two decades of securities industry experience.



Leadership.



Grow.



Endless Potential.

CSP is continually evolving and expanding to meet the changing needs of life insurance and financial planning professionals, enabling them to best secure and grow the assets of their high net worth clients.

Join the Capital Synergy Partners Network.

We invite you to work with our group of experienced, financial professionals. We look forward to helping you secure your clients' and your own successful futures.

**Call us for more information: 888.277.1974
or visit us online at www.CapitalSynergyPartners.com**

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