



**Senior Marketing Consultant**

***Professional Expertise:***

- Executive Compensation Planning
- Business Continuation Planning
- Retirement Planning
- Advanced Estate Planning
- Financial Products Analysis & Design

---

214-662-5898 Cell  
214-696-9756 Office  
214-368-0308 Fax  
gpotthoff@insdesign.com

---

9400 N. Central Expressway, Suite 608  
Dallas, TX 75231  
www.insdesign.com

## Gary Potthoff, CLU, ChFC

Gary has been in the financial services industry for over 35 years specializing in promoting the efficient transfer of wealth from one generation to the next. As an independent insurance and wealth transfer specialist with Insurance Designers of Dallas, he initiates the design, implementation and administration of wealth transfer programs for the high net worth client. Working closely with a client's existing advisors or drawing from a network of seasoned professionals within the financial services industry, he is able to initiate and fine tune successful programs that has saved client's millions of dollars.

Gary currently offices in the Dallas/Fort Worth area servicing clients throughout the US.

Prior to relocating to the DFW area, Gary was associated for 6 years with the JP Morgan Chase Private Bank in NY and TX where he integrated life insurance alternatives within wealth transfer programs. He serviced the NY metro area, Chicago, Denver, San Francisco and LA markets.

Gary started his career in Omaha, NE. In 1984 he merged his executive benefits business with AON Risk Services to specialize in the executive benefits and wealth transfer areas. As regional manager he developed the NE, IA, MN and WI affluent client base specializing in the design, implementation, and administration of life insurance strategies within wealth transfer programs. In 1994 he transferred to Dallas to build the SW Region for AON Risk services. His practice focused on wealth transfer planning for both executives of Fortune 500 companies and closely held business owners.

Gary and his wife Linda enjoy outside activities and long weekends visiting their three children and grandchildren.