David Bell
Executive Vice President

About David

With a wealth of real world experience in the financial services industry, David brings with him the expert areas of global Comprehensive Wealth Management, with an emphasis on taxes, investments, insurance, life income planning, and trusts. His experience in developing relationships, delivering technical subject matter, and producing results in the sales industry has given him the backbone for delivering training/consulting positioned directly to the affluent marketplace. He has worked with some of the most well know athletes and entertainers and their managers in the areas of risk management for both their world exposure and their personal lives. This has given David a very clear and realistic view of the high-net worth client situation and the issues associated with that individual. Known for his complete grasp of all the areas of wealth management for the affluent client, participants and students in his classes consistently rate his programs as highly effective and immediately useful.

Primary Areas of Expertise

Sales and Sales Management
Wealth Management
Insurance
Life Income Planning
Personal Trusts

Education

B.S. Management Science - Georgia Institute of Technology
Licensed Agent - Life, Health, Property, & Casualty

Designations, Affiliations & Licenses

Certified Wealth Strategist®
Athens Area Independent Insurance Association
    Chairman for the Governmental Affairs Committee of Georgia
Georgia Independent Insurance Association Board of Directors
Professional Insurance Agents (PIA)

David Bell - Executive Vice President

Featured Speaker & Lecturer

- Bank of America
- BB&T
- Charles Schwab
- HSBC
- KeyBank
- PLANCO/THE Hartford
- TIAA-CREF
- TD BankNorth
- USAA

Professional Experience

David has over 22 years experience in the wealth management, insurance, risk management, and financial planning industry. His primary focus has been advising and consulting clients in all areas of wealth management, as well as assisting financial advisors with investment specialties in growing their book of business through Comprehensive Wealth Management. David's individual commitment to the client satisfaction is well known, and his practice now includes national work as a wealth management, insurance, banking, trust, and investment management consultant, speaker, trainer, and personal coach. He consults and trains the financial services industry on technical, risk, sales and relationship management, investments, and retirement plans. He began working with Cannon Financial Institute in 1991, and has been a full-time instructor since Jan 1, 1999. David has served as President of the Athens Area Independent Insurance Association, District 6 Director for the Independent Insurance Agents, Chairman for the Governmental Affairs Committee of Georgia, and is a former member of the Georgia Independent Insurance Association Board of Directors. He is an active member of the Professional Insurance Agents (PIA) and the Independent Insurance Agents of Georgia.