

# Life Plans/GBS Insurance

## *Life Settlement Brokerage Division*

### **Life Plans/GBS**

Life Plans/GBS has been serving the North Eastern brokerage community since 1969. Since its inception, Life Plans/GBS has become known for providing creative insurance products, underwriting expertise, marketing support and education to our agents. Professionalism and ethics have always been our watchwords, and they have served us well.

Life Plans/GBS over the years has developed a staff of over 20 dedicated Individuals who are trained and ready to provide such services as in-house underwriting, advanced sales support, Long Term Care Sales Support, Premium Finance for life insurance and Life Settlements.

In March of 2002 Life Plans Unlimited was acquired by GBS Insurance & Financial Services Inc., a division of Arthur J. Gallagher, which is a publicly traded company.

### **Life Plans/GBS - Life Settlement Brokerage Division**

Life Plans/GBS has offered life settlement services to their clients since 2005. In January of 2008, Jay Robbins joined the company as Director of Life Settlements, to manage and run the Life Settlement Brokerage division.

As a boutique life settlement brokerage we offer customized and special attention to each individual case. With years of experience in the life settlement market we have strong business relationships with all major institutional buyers.

Operating as an open-model life settlement brokerage, we represent the seller and shop cases to every applicable buyer in the market using our experience to negotiate for the highest offers in the shortest amount of time. Owned by a public company, we conform to the highest level of compliance, privacy laws and standards and provide Errors and Omissions coverage. We believe in full transparency with our clients and will disclose all bids and fees in regards to your case.

With over 30 years in the life insurance business we have strong relationships with all major life carriers. These relationships are vital when it comes to obtaining policy information and policy verifications from carriers, which are needed to both successfully shop Life Settlement cases and to successfully close Life Settlement transactions in a timely manner.

Our life settlement brokerage division was originally created to service the needs of our 2,000+ agents located across the country who already enjoy working with us to help provide suitable products for their clients whether it be life insurance, long term care or annuity business. We are extremely competitive regarding the fees we charge for transacting life settlement brokerage business, especially in relation to other life settlement brokers in the market who depend solely on commissions earned on each life settlement case.

Call anytime to speak with a life settlement expert. We are happy to provide life settlement marketing material, answer any questions you may have or discuss potential life settlement cases.

Jay Robbins, Director of Life Settlements  
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### ***Jay Robbins, Director of Life Settlements***

With a wealth of experience in both the insurance and finance industry, Jay has worked with the nation's top institutional investors and lenders. From brokering transactions to bidding on policies, he understands the Life Settlement and Premium Finance Markets and knows the players involved. His knowledge and experience will ensure your clients receive the highest bids from the market in the shortest time.

- Jay joins us from Silver Point Capital, a private investment fund in Greenwich CT where he was a buyer / trader of Life Settlements and was responsible for building direct relationships with agents and agencies. Previously, he was the Regional Sales Director for LifeOptions LLC, a Life Settlement and Premium Finance brokerage company in Stamford, CT.
- Prior to entering the Life Settlement industry Jay was series 7 & 66 licensed as financial planner specializing in fixed income products for high net worth individuals and as an internal wholesaler of mutual funds and separately managed accounts.
- A graduate of the University of Massachusetts, Amherst where he played Division I Lacrosse. Jay and his family live in Greenwich, CT.

### ***Malcolm Sklar, President of Life Plans/GBS Insurance and Financial Services***

Malcolm Sklar started his 34 year insurance career in 1973 with Phoenix Mutual Life after graduating from Jacksonville University in 1972.

- In 1975 he joined Life Plans Unlimited, which was one of the first General Agents with Security Connecticut Life. In 1987 Malcolm was appointed President of Life Plans and participated on the original Security Connecticut Advisory Council. Over the years, Malcolm has also served on multiple life insurance company advisory boards.
- He is past president of Life Inc., and served on the board of LifeMark Securities.
- Malcolm was also a founding partner of LifeMark Partners Inc., a nationally prominent insurance marketing organization, and is currently Chairman of the Board.
- He is also currently the president of GBS Insurance and Financial Services, the insurance and employee benefits division of Arthur J. Gallagher, which acquired Life Plans Unlimited in 2002.
- Malcolm has authored many articles for trade publications and has been featured Speaker at various industry events.
- He resides in Redding, CT with his wife Carole, and has two grown children Alexis and Todd.