



FIRST SUMMIT FINANCIAL – LAKE MARY, FL



Member Overview

First Summit Financial is a well established, national organization providing comprehensive services and support to independent producers, general agents, marketing organizations, trusted advisors and other professionals in the insurance and financial services industries.

Recognizing the importance of providing complete financial services, First Summit Financial represents many of the nation's highest rated, financially sound insurance companies.

Member Value Proposition

First Summit strives to maintain leading-edge concepts to provide successful solutions for all insurance and financial services needs, including Case Consultation, Case Design and Implementation, Complete Software and Proposal Support, Advanced Sales Support, Business Continuation Planning, Executive Compensation and Employee Benefits, Qualified Plans, Small Business Retirement Planning, Wealth Accumulation, Estate Tax Analysis, Qualified Plan Distribution Analysis and more.

Member Leadership

- » William Pickering, President & CEO
billpickering@firstsummitfinancial.com

First Summit's growth, reputation, and many successes over almost 30 years, have enabled them to invest in the highest caliber professionals and technologies - allowing them to serve their clients effectively and efficiently as an industry leader.

Expertise in

- » Life
- » Annuities
- » Securities*
- » Health
- » Disability
- » Group

*Investments and advisory services offered through Lincoln Financial Securities Corporation, Member SIPC. Branch office: 605 Crescent Executive Court, Suite 100, Lake Mary, FL 32746 (321) 206-0015. First Summit Financial and Lincoln Financial Securities Corporation are not affiliated.

Member Contact Information

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