



## **George C. Huff**

President

### **General Education**

Bachelor of Science - Engineering, United States Military Academy, West Point, NY 1958

Masters Degree - Mathematics, University of Miami, Miami, FL 1961

Graduate Courses – Education, University of Maryland, U.S. and Overseas

Graduate Courses – Tax, Finance & Investments, New York University

### **Professional Experience**

**1989 – (Present)**

#### **American Benefit Institute (Founder)**

American Benefit Institute provides for successful, experienced financial advisors, the most advanced turnkey systems that integrate many leading edge advanced planning concepts, proprietary intellectual planning technologies, perfected delivery systems and innovative consumer driven financial services.

These integrated proprietary disciplines are utilized by the experienced financial advisors to assist their affluent clients in creating, building, protecting, preserving and transferring their wealth.

American Benefit Institute serves over 3400 Corporations nationally, and their owner/executives, through a national network of 400 seasoned independent financial advisors. American Benefit Institute believes and practices advanced wealth planning in a proactive, collaborative way that engages the client, the client's family, client's trusted advisors (CPA's, Attorneys and other skilled professionals).

American Benefit Institute provides a Proprietary Advanced Executive Compensation Capability/Discriminatory Wealth Creation Program supported by a National Network of Law Firms and CPA Firms.

**1997 – (Present)**

#### **Professional Advisory Group, International**

PAG is a Comprehensive Wealth Planning Practice that provides the successful business owner and professional with fully integrated comprehensive financial, investment, tax, retirement and estate planning services.

Professional Advisory Group utilizes national and global strategic alliances with over 36 unique specialty resources and experts to assist our clients in achieving their major objectives and goals:

- Wealth Creation and Enhancement
- Wealth Protection
- Wealth Preservation and Transfer
- Perpetuation of Cherished Value Systems

#### **1975 to 1990**

##### **UNIMARC (Founder)**

- Recruited and trained over 2,200 general agents (certified financial planners, financial advisors, PPGAs and large general agencies);
- Developed early innovative universal life look-alike (Modified Premium Whole Life plus a no load cash value rider with paid up additions [Deposit Term] plus cash value rider) that provided dramatically increased living benefits as well as increased survivor benefits with the same outlay.
- Delivered over 25,000 life insurance contracts annually; Placed over 130,000 policies in force with 3 companies (First Penn Pacific, American Life & Casualty and University Life)
- Developed over \$ 200,000,000 in annuities per year (Savers Annuity—Proprietary Design) in 1980 through 232 financial institutions (very first annuity bank marketing pioneer for outside services)
- Developed first 3<sup>rd</sup> party bank marketing company (Intermediation Systems, Inc. 1978-1981).

#### **1977 to 1988**

##### **Financial Planners Equity Corporation (Founder)**

- 120 branch offices nationally & internationally (5 European Countries)
- 600+ financial advisors (Certified Financial Planners)
- Over \$200,000,000 per year in new equity capital, Full service broker/dealer
- 10<sup>th</sup> largest NASD firm in the U.S. in the 1980's.
- Board of Directors composed of seven past presidents of the International Association of Financial Planners (currently the Financial Planners Association); Placed assets under management with the nations leading independent money managers using no load mutual funds and asset allocations
- One of the first National Broker Dealers with a National Registered Investment Advisory System - 1979
- Sold distribution system to Fortune 150 company in 1987-1988

#### **1966 to 1975**

##### **Capital Funding Corporation (Co-Founder)**

- First publicly traded national financial planning company
- Recruited and trained over 2,400 financial advisors
- Sold over \$ 100,000,000 in mutual funds annually
- Sold over \$ 1,000,000,000 of insurance coverage annually in integrated financial plans to the affluent business owners, professionals, and highly compensated employees

- Pioneered a Registered Funding Concept with the SEC that integrated 100% investment in professionally managed diversified mutual funds and used them as collateral for a loan (with deductible interest) to fund very competitive term insurance that guaranteed self completion
- Owned California domiciled life insurance company (American Pacific Life) from 1969 to 1974, asset growth from \$2.4 million to over \$200 million
- Developed large pension administration company 1969-1974 (900+ Corporate Pension Plans) sold to Certified Portfolios, Incorporated in 1974
- Owned NYSE Institutional Trader and two NASD firms (seats on all major exchanges held by Dahlman and Company)
- Grew assets 800% in 5 years of operation
- Sold American Pacific Life to Gulf & Western/Capitol Life in 1974
- Sold controlling interest of Parent Capital Funding Corporation to Gulf & Western Corp. in 1974

**1964 to 1967**  
**Mutual of New York (Assistant Manager)**

Extensive experience with a large eastern mutual insurance company in all phases of sales and sales management. (Recruiting, Training, Supervising, Motivating and Upgrading a sales organization.)

**1962-1964**  
**United Services Planning Association**

Extensive training and experience in money management, selection of money managers and delivery of investment services to US Military Officers and NCO's, American Expatriate Executives and Affluent Foreign Nationals desiring to invest in the US market.

**1958 – 1962**  
**Captain – U.S. Army**

Service Overseas

**Professional Education and Special Preparation**

Graduate Courses / Finance – New York University Extension, NY

Courses in Finance, Tax, Retirement and Estate Planning sponsored by the following organizations:

- American College of Life Underwriters
- American Institute of Certified Public Accountants (AICPA)
- ALI – ABA
- American Bar Association
- CPA Societies
- California Institute of Certified Public Accountants (CICPA)
- Florida Institute of Certified Public Accountants (FICPA)

- Institute of Certified Financial Planners (ICFP)
- International Association of Financial Planners (IAFP)
- Life Underwriter Training Council (LUTC)
- Practicing Law Institute (PLI)
- Fortress Financial Group (FFG)