PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Matthew M. McKenzie, CLU®, ChFC®

Region Focus: Boston

Background & Experience

As the President and Principal of Thomas Brady & Associates, Matt sets the vision of the firm and leads the overall management and strategy of the national insurance practice. Since being appointed President, his direction has contributed to the continued growth and expansion of the firm.

With over two decades of diverse industry experience, Matt represents PLAN specializing in the areas of business planning, estate planning and insurance placement. He works closely with the company's clients and strategic partners to develop custom opportunities and oversees the delivery of tailored solutions for the ever-changing needs of the firm's full range of clients which include business owners, individuals and families.

Matt began his career in the insurance industry with New England Financial, where he worked in various roles including New Business, Underwriting, Life Product Development and Advanced Marketing. After spending a number of years inside the insurance company, Matt moved into a distribution role as Regional Vice President with MetLife Investors, where he was responsible for estate and business planning concepts for both high net worth individuals as well as business clients. A frequent industry speaker, Matt has been nationally recognized for his distinguished accomplishments as a sales professional.

Certifications & Education

- Series 6, 7, 26, 63
- Chartered Life Underwriter® (CLU®) & Chartered Financial Consultant® (ChFC®)