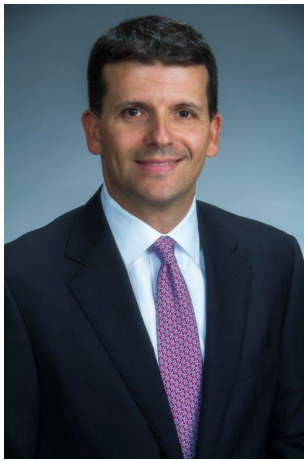
PLAN
PROFESSIONAL LIFE ADVISORS NETWORK



Tony De Vita, CFP®

Region Focus: Southeast, north to Boston

Background & Experience

Tony De Vita is a planning resource who assists in protecting clients' lifestyles, legacies and ability to transfer wealth. Through a holistic wealth management approach, Tony provides the insight of a seasoned life insurance, estate planning and financial planning professional. Tony coordinates the comprehensive service process with attorneys, accountants and other professionals, as well as through the underwriting and issuance of new policies. Ultimately, Tony helps plan for the multitude of longevity issues that we may all experience.

Prior to joining PLAN, he spent 6 years with UBS as an Insured Solutions Consultant. working directly with financial advisors and their clients. During that time, he was focused on developing advisor relationships to provide a consultative resource for estate planning, wealth transfer and business planning. Leading up to UBS, Tony spent 14 years with AIM Systems Inc. mostly working directly with advisors and clients. Either in front of clients, CPAs, attorneys or the financial advisor, Tony's goal is to provide detail in a manner that allows all parties to make a well-informed and prudent decision. Years of experience in this field have led to a consistent planning process for all clients, which allow Tony to generate an excellent service and value experience to the client and financial advisor.

Certifications & Education

- B.B.A. in Finance from the University of Georgia
- Series 7 & 63 licenses
- Life and Variable Life licenses