

About Us

Pinnacle Financial Services is a national marketing organization, licensed in all states. We offer a complete line of **Medicare, Health, Life, Annuity,** and **Long-Term Care** products, providing you with one-stop-shopping for all of your client's needs.



We believe in building a personal relationship with each and every agent.

- KEVIN SHIELDS, CEO

Whether you're a financial advisor, independent insurance agent, or a large agency working multiple states, we want you to join our team and become a Pinnacle partner. We ask for you to try us, for at least one carrier. Why? Because once on-boarded, our agents generally experience a twenty to forty percent increase in production. We think that will convince you to work with us!

How do our agents accomplish that level of growth?

Our large team of dedicated senior market specialists are available to assist you with your questions, client eligibility, and develop marketing strategies. We offer face-to-face and online training. Everything is available through our website for you to review at your leisure. At the end of the day, we're happiest when you're happy- it's all about shared success.

Our program starts with an online introduction to our website with our **full suite of tools including online data entry and enrollments through Connect4Medicare and IGO Life E-Application.** Learn about all of our quoting engines including Medicare, Life Insurance, Final Expense, Long-Term Care, and more.

We also offer an **agent CRM system that gives you real-time case status 24/7,** plus lead programs for all products and budgets. We'll even design a custom marketing program to grow your business.

We'll show you all the steps, from submission to commission!

PINNACLE SALES TEAM

HEALTH x7731

Fax 267-386-8135

LIFE, ANNUITY, & LTC x6003

Fax 267-386-8132

NEW BUSINESS

HEALTH x7612

Fax Numbers

267-386-8137 267-386-8139

267-386-8138 267-386-8140

LIFE, ANNUITY, & LTC x3302

Fax 267-386-8132

PINNACLE SUPPORT TEAM | supporthealth@pfsinsurance.com

HEALTH x7729

LIFE, ANNUITY, & LTC x3302

Rich Danese MANAGER, HEALTH DIVISION

Mary Schwartz MANAGER, HEALTH DIVISION

Bill Vandergrift SUPERVISOR - LIFE, ANNUITY, AND LTC

David Baranek SUPPORT LIFE, ANNUITY, AND LTC

Amy Cohen SUPPORT SPECIALIST, HEALTH

Di Vit SUPPORT SPECIALIST, HEALTH

Lilliam Florez SUPPORT SPECIALIST, HEALTH

Teresa Held SUPPORT SPECIALIST, HEALTH

LICENSING/CONTRACTING x7750 | licensing@pfsinsurance.com

Margaret DiMemmo SUPERVISOR - LICENSING AND CONTRACTING

Stevie Nagel SUPERVISOR - LICENSING AND CONTRACTING

Cassidy McKelvey LICENSING SUPPORT SPECIALIST

Courtney Sklar LICENSING SUPPORT SPECIALIST