

Ryan Bertrand

CFP®, CLU®

Vice President and Managing Director, Advanced Markets



RYAN BERTRAND joined the Transamerica Advanced Markets Group with more than a decade of experience in the financial services industry. Prior to joining Transamerica Capital, Inc., Ryan was a director at Jackson National Life Distributors Retirement and Wealth Strategies Group.

Ryan brings his experience to a highly professional group that focuses on estate planning, financial planning, taxation, retirement plans, and charitable planning. By focusing on these areas, he is able to identify business opportunities through the use of advanced financial planning strategies. Ryan is dedicated to helping representatives build their businesses and helping their clients by providing effective guidance, case design, and strategies.

Ryan's background and experience provide an essential component for Advanced Markets. Working with the rest of the group, Ryan helps create a professional department that can provide assistance in financial planning, estate planning, taxation, retirement plans, and charitable giving.

At a glance

- Effective guidance, case design, and strategies
- Business opportunity identification
- Experience in estate planning, financial planning, taxation, retirement plans, and charitable planning

Accreditations

- Certified Financial Planner™ (CFP®)
- Chartered Life Underwriter® (CLU®)
- FINRA Series 6 and 63 registrations

Background

CURRENT RESIDENCE

Denver, CO

EDUCATION

Bachelor's Degree, Political Science,
Metropolitan State College of Denver

HOMETOWN

Colorado Springs, CO

Get in touch



EMAIL

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VISIT

TransamericaAdvancedMarkets.com

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™, and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Securities offered by Transamerica Capital, Inc. (TCI), 1801 California Street, Ste 5200, Denver, CO 80202.

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