

Gary A. Englund
204 Crystal Grove Blvd.
Lutz, FL 33548-6460
(813) 948-1001

Employment: Englund & Overton, LLC, President & Founding Member
Financial Advisor, Raymond James Financial Services, Inc.

Degrees, Professional Designations:

- B.A. Economics, Univ. of Minn., Summa cum laude
- B.A., Sociology, Univ. of Minn., Summa cum laude
- Juris Doctor, University of Minnesota Law School
- Chartered Life Underwriter
- Chartered Financial Consultant
- Masters of Science in Financial Services
- Certified Financial Planner
- Accredited Estate Planner
- Registered Health Underwriter
- Registered Employee Benefit Counselor
- Certified in Long Term Care
- Chartered Advisor in Philanthropy
- Certified Divorce Financial Analyst

Experience

- More than thirty years of experience in providing financial planning products and services to individuals, families and businesses
- Adjunct faculty member (Financial Planning Principles, Insurance Planning and Estate Planning), Tallahassee Community College's Professional Financial Planning Program and Kaplan Financial's Certified Financial Planner™ Program
- Consulted as an expert witness in life insurance and annuity matters. Clients included the Florida Department of Financial Services.
- 2008 Chair, Council of Examinations of the Certified Financial Planner Board of Standards. Prior volunteer service to the CFP Board of Board of Standards included the Pass Score Committee, Field Testing, Insurance Audit Committee and Content Specialist.
- Selected as the financial advisor for the investment funds held by the 4000-member Florida Association of Insurance and Financial Advisors.

- Original member of the Florida Insurance Commissioner's Continuing Education Advisory Board
- Approved as school and instructor for Florida continuing education for life insurance agents

Industry Involvement

- Two-term (1995-1997) President, Tampa Association of Life Underwriters
- Former director, Tampa Bay Estate Planning Council
- Former director, Tampa Bay Society of CLU and ChFC
- Former director, governmental relations chair, Tampa Bay Society of Certified Financial Planners
- Tampa Life Underwriter of the Year, 1998, as awarded by the Tampa Association of Life Underwriters; Charter member of the Tampa Association of Life Underwriters' Hall of Fame
- Original Chair, Committee on Agent Ethics and Business Practices, Florida Association of Insurance and Financial Advisors

Licenses

Insurance: life, health and variable annuity; Securities industry's Series 7, 65, 24, 9 & 10.

Originally admitted to Minnesota Bar in 1976. License now inactive (lived in Florida for past 24 years) but eligible for reactivation.