

Ryan Bertrand, CFP®, CLU®

Vice President and Managing Director,
Advanced Markets Group



Ryan heads the Advanced Markets Group.

Ryan joined the Transamerica Advanced Markets Group in 2011 with more than a decade of experience in the financial services industry. Prior to joining Transamerica, 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 help their clients by providing effective guidance, case design, and strategies.

Ryan's background and experience provide an essential component for the Advanced Markets Group. 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.

About Ryan:

- Effective guidance, case design, and strategies
- Business opportunity identification
- Experience in estate planning, financial planning, taxation, retirement plans, and charitable planning
- Certified Financial Planner™ (CFP®)
- Chartered Life Underwriter® (CLU®)
- FINRA Series 26, 6, and 63 registrations

Contact Ryan:



720-493-4008



rbertrand@transamerica.com



transamericaadvancedmarkets.com

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