

# RYAN BERTRAND, CFP®, CLU®

VICE PRESIDENT AND MANAGING DIRECTOR, ADVANCED MARKETS



## Ryan heads the Advanced Markets department

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 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.

## 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](mailto:rbertrand@transamerica.com)



[transamericaadvancedmarkets.com](http://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.

125809R3  
© 2022 Transamerica

**Helping People Achieve  
a Lifetime of Financial Security**

