



PACIFIC LIFE

5 Ways the Advanced Designs Unit (ADU) Can Help You with Your Life Insurance Business

The Advanced Designs Unit (ADU) is a highly recognized team of advanced marketing experts in the life insurance industry. It is comprised of a select group of attorneys who specialize in advanced planning concepts that involve life insurance including estate planning, business succession planning, executive compensation, charitable planning, split dollar, premium financing, and qualified plans.

1

CASE CONSULTATION

Discuss your life insurance cases with the ADU

2

CONTINUING EDUCATION WEBINARS

Schedule a webinar through your Pacific Life representative on various sales strategies and receive continuing education credit

3

DIRECT ACCESS

Life insurance producers and professional advisors can call or email the ADU directly with technical questions

4

BUILDING STRATEGIC ALLIANCES PROGRAM

Improve your relationship with centers of influence by providing valuable planning ideas and materials and inviting them to a special series of quarterly webinars

5

SALES IDEAS

Discuss new concepts or pick up new ideas from our advanced designs brochures, pocket guides, professional guides, or presentations

SCAN FOR MORE INFORMATION ABOUT PACIFIC LIFE'S ADVANCED DESIGNS UNIT



**Investment and Insurance Products: Not a Deposit • Not Insured by any Federal Government Agency
Not FDIC insured • No Bank Guarantee • May Lose value**

Meet the ADU Team



Monica Rhee
JD, LLM
ADU Leader
Assistant Vice President
Advanced Designs
Monica.Rhee@PacificLife.com

Monica received her Bachelor's degrees in Biology and Environmental Analysis & Design from the University of California, Irvine (UCI), her Juris Doctor (JD) degree from Loyola Law School, and her Master of Laws (LLM) degree in Taxation from Chapman University School of Law. Monica is a member of the State Bar of California.



David Boekeloo
JD, MST, CFP, CLU®,
ChFC®, AEP®
Advanced Planning Director
David.Boekeloo@PacificLife.com

David received his Bachelor's degree from Spring Arbor College, his Juris Doctor (JD) from University of Toledo, and his Master of Science in Taxation (MST) from Grand Valley State University. He holds the Chartered Life Underwriter (CLU®) and Chartered Financial Consultant (ChFC®) designations from The American College. He has also received his Certified Financial Planner professional designation from the Certified Financial Planner Board of Standards. He was awarded the Accredited Estate Planner (AEP®) designation from the National Association of Estate Planners & Councils.



Rogel Lunaria
MBA, CLU®, ChFC®
Senior Complex Case Analyst
Advanced Designs
Rogelio.Lunaria@PacificLife.com

Rogel received his Bachelor of Science in Human Ecology from the University of the Philippines and his Master of Business Administration from the University of Phoenix. He holds the Chartered Life Underwriter (CLU®) and Chartered Financial Consultant (ChFC®) designations from The American College of Financial Services. He also holds Series 6, Series 63, and California Life and Health licenses.



Chris Layeux
MBA, CLU®, ChFC®
Complex Case Consultant
Advanced Designs
Chris.Layeux@PacificLife.com

Chris earned his Bachelor's degree in Business Administration with a specialization in Marketing from the Marquette University and his Master of Business Administration from Thomas College. He holds the Chartered Life Underwriter (CLU®) and the Chartered Financial Consultant (ChFC®) designations from The American College of Financial Services.



Bret Riddle
JD, MBA
Senior Analyst
Advanced Designs
Bret.Riddle@PacificLife.com

Bret received his Bachelor's degree from the University of San Diego, and his Master of Business Administration (MBA) degree and Juris Doctor (JD) degree from the University of Kansas. Bret is a member of the State Bar of Missouri and is Registered In-House Counsel with the State Bar of California.



Stephen Alloy, JD, MBA,
CLU®, ChFC®, MSFS
Advanced Designs
Field Director
Stephen.Alloy@PacificLife.com

Stephen received his bachelor's degree from the University of Iowa, juris doctor from Loyola University Chicago School of Law, MBA from J.L. Kellogg Graduate School of Management at Northwestern University, and Master of Science in Financial Services (MSFS) from The American College. He served as a member of the LIMRA Advanced Sales Committee for 10 years, and he holds Series 7, Series 63, Series 65, Series 26, and life, health, and property and casualty insurance licenses.

AdvancedDesigns@PacificLife.com or (800) 800-7681, ext. 3690.

Pacific Life Insurance Company is licensed to issue insurance products in all states except New York. Product/material availability and features may vary by state.

Pacific Life, its affiliates, their distributors and respective representatives do not provide tax, accounting or legal advice. Any taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor or attorney.

The home office for Pacific Life Insurance Company is located in Omaha, Nebraska.

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