CAPITAL INSIGHT
FINANCIAL GROUP

Jacob J. Reid | Financial Advisor
jreid@capitalinsightfg.com
Phone: (925) 449-7830
CA Insurance License #0H05483
www.capitalinsightfg.com

Capital Insight Financial Group

Life Insurance

Highland Capital Brokerage

- Banner
- Prudential
- Protective
- John Hancock
- West Coast
- Lincoln
- Guardian
- Columbus Life
- Genworth
- Various Others

Investment & Wealth Management

Cambridge Investment Research (*Brokerage)

Direct – Alternative Investments

- Private Equity
- Various REITs
- Private Credit

Direct Variable Annuities

- Pacific Life
- Lincoln
- John Hancock
- Prudential
- Nationwide
- Brighthouse
- American General
- Various Others

Direct Mutual Fund

- Capital Group American Funds
- Franklin Templeton
- Putnam Investments
- Voya Inst Trust
- Principal Funds
- John Hancock
- Various Others

Pershing LLC (Clearing Firm)

Brokerage accounts

Brokerage & Wrap Advisory Accounts

- Stocks
- Mutual Funds
- ETFs
- Bonds

The Ameriflex Group - RIA (*Advisory)

Pershing LLC (Clearing Firm)

AssetMark Inc

Asset Managemnet Platform

Pershing Advisor Solutions (Clearing Firm)

Advisory accounts

- Savos Investments
- American Funds
- Clark Capital
- JP Morgan
- First Trust
- Van Eck Strategies

Various Money Managers

Retirement & Financial Planning

EMoney & NaviPlan/Investcloud

*Brokerage and Advisory accounts include all registrations: IRA, Roth IRA, Simple IRA, SEP IRA, 401(k), Individual, Jtwros, Jttn, Trusts, UGMA's, 529's