

Bart Snyder, CLU

Navigating a client's insurance situation can be challenging. It's not uncommon for clients to arrive with a tangled mess of insurance products they've been sold by outside insurance representatives. Bart provides **independent insurance reviews integrated with client's financial plans** - helping untangle everything, providing a clear overview of the current situation, goals-based recommendations, the consequences of any moves, and alternative ideas.

Bart is a member of the Churchley Financial Group Team and has expertise in life insurance, annuity products, long-term care, and disability insurance products. Since objectives vary widely from person to person, so does his individualized planning solutions. While Bart's role at Foundation is consulting, when needed, his access to a variety of insurance products from multiple carriers allows him to design a tailored and unique plan that's integrated with the client's financial planning goals and objectives.

Brody and Bart have worked together to service several high net worth and business owner clients ensuring their insurance and financial planning advice are in-sync.

Professional Accreditations & Education:

- Chartered Life Underwriter (CLU), The American Collage
- Long-Term Care Certified
- BA, University of Colorado
- FINRA Series 6, 7, 63 and 65 securities licenses
- Life, health, variable life insurance, and annuity licenses

Bart resides in Golden, Colorado with his wife, Meredith, daughters Ellie and Caitlyn, and Labrador Retriever, Lula. He's active in the Vail Valley Foundation, enjoys mountain biking, and spending time with his daughters.