Harry L. Thomas, Jr., CLU, ChFC

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www.thomasgroupinc.com

Qualifications

Education and Professional Designations

Chartered Life Underwriter (CLU)
Chartered Financial Consultant (ChFC)
Chartered Advisor Senior Living (CASL –
to be awarded July, 2011)
B.A., University of Virginia, 1976 (with distinction)

Awards and Recognition

Million Dollar Round Table, Life & Qualifying Member, 1977-present
Top 40, All-Time Lives Producer, Northwestern Mutual Life
National Quality Award recipient (many times)
Frequent Industry Speaker
President, Association of Agents, Northwestern Mutual 2005
President, Financial Representatives Association, NML, 1989-90
Top of the Table (twice)

Associations and Memberships

National Association of Insurance and Financial Advisors (1977 – Present)
National Association of Health Underwriters (NAHU)
Greater Washington, DC Association of Health Underwriters (GWAHU)
Society of Financial Services Professionals
Association of Advanced Life Underwriters

Representing Northwestern Mutual & other carriers since 1976

The Thomas Group, Inc. Mission Statement

The ambition of The Thomas Group, Inc. is to provide our clients with an unparalleled experience of service excellence and to provide our clients with the best possible advice over and over. Our business is built on four pillars. First, we will always strive to do what we say we'll do when we say we'll do it (accountability). Second, we want to say "please" and "thank you" (gratitude). Third, we want to show up on time (respect for our clients). And, fourth, we want to *always* do the right thing (integrity). If we follow our mission every day, good things happen for us and our clients on a daily basis.

Professional Specialties

Executive Compensation
Employee Benefits
Personal and Business Insurance Planning

Employee Benefits Sales and Service

Establishment of Medical Benefit Plans
(Plan design and implementation)
Flexible Spending Accounts
Health Savings Accounts
Health Reimbursement Accounts
Group Life, Long Term Disability,
Short-Term Disability, Vision Care,
Dental Insurance

Retirement Plans Services

Plan Features and Design Consultation Plan
Investments Assessment Provider/TPA
Consultation Employee Enrollment
Meetings Employee Retirement
Consultation Employee Rollover
Services Plan Benchmarking Analysis
Plan Cost Evaluation
ERISA Compliance/404(c) Assistance
Fiduciary Education

Qualified Retirement Plan Expert

401(k) & Individual 401 (k) Plans
457 and 403(b) Plans
Defined Benefit & **412(i) Plans**
Profit Sharing Plans
Money Purchase Pension Plans
SEP & SIMPLE IRA Plans

Business Planning Analysis

Business Continuation Assessment Key
Employee Protection Business
Expense Protection Employee
Benefits