NORTHERN

ENTREPRENEURSHIP WORKSHOPS 2012-13

Tuning Your Future Requires Some Orchestration: Wealth Transfer and Estate Planning for Changing Times

Lawrence C. Barrett, BSBA ’71, ACIT ’97, H of F ’04

Nov. 27, 2012
5:30 - 7 p.m.

CEDC
Community Economic Development Center
at
Ohio Northern University
Allen | Hancock | Hardin | Wyandot

Lawrence C. Barrett,
BSBA '71, ACIT '97, H of F '04

Lawrence C. Barrett, CLU, ChFC received his BS from Ohio Northern University in 1971. Upon graduation, he entered the insurance and investments business, working primarily in the business and professional markets. Besides holding the CLU (Chartered Life Underwriter) and ChFC (Chartered Financial Consultant) designations, he is a general securities principal. Barrett has spent more than 33 years in sales management.

He owns DiBart Insurance Agency Corporation and Chase Financial Services and currently is the regional vice president for Sagemark Consulting (Lincoln Financial) and a registered representative for Lincoln Financial Advisors (a NASD firm). He also does substantial personal production in the financial and estate and business succession planning arena.

Barrett has been a consistent qualifier for the Million Dollar Roundtable, National Sales Achievement Award and National Quality Award. Professional memberships include CAIFA, NAIFA, SFSP, AHIA, NAHU, IIAA and the Estate Planning Council.