

Jeff Marsh, Financial Adviser



Founder and Principal, BOLI Strategic Partners

In early 2013, BOLI Strategic Partners assumed the Bank Owned Life Insurance operations of NYLEX Benefits which was a subsidiary and the executive benefits consulting arm of New York Life Insurance Company.

BOLI Strategic Partners is dedicated to working with community banks to provide efficient strategies to offset employee benefit expenses. BOLI Strategic Partners is a nationally recognized vendor of Bank Owned Life Insurance providing services to banks throughout the United States.

Mr. Marsh was raised in Lingle, Wyoming. He received both his Bachelor's and Master's degrees from the University of Wyoming and is also a graduate of Eastern Wyoming College.

Jeff is a Investment Advisor Representative with Eagle Strategies LLC, A Registered Investment Advisor. Jeff joined New York Life in 1987 and established himself as one of the top agents for the company in Wyoming, and western Nebraska. Prior to his association with New York Life, he was an elementary school counselor, track coach, and owner of a residential construction company. Jeff is a life and qualifying member of the Million Dollar Round Table Top of the Table and has been a featured keynote speaker on financial and insurance estate planning topics throughout the United States.

Activities and Community Involvement

Board of Trustees—University of Wyoming

Board of Directors—Platte Valley Bank, Torrington, Wyoming

Past President – Torrington Rotary Club

Past President – Eastern Wyoming College Foundation

Past President & former board member – Community Healthcare Foundation, Torrington, Wyoming

Former Member – Wyoming State Board of Education

Former Member and Chairman – Wyoming School Facilities Commission

Former Member Board of Directors – Delta Dental of Wyoming

Former Member Board of Trustees – Community Hospital, Torrington

Distinguished Alumni – Eastern Wyoming College, 2003

Member – St. Rose of Lima Catholic Church

Jeff resides in Torrington, Wyoming with his wife Cathy. They have three grown children, Britt and his wife, Brenna, Blakeley and her husband, Nicholas and Allison and her husband Logan. They also are the proud grandparents of Finley. Jeff's hobbies include building, hunting, fishing and he is an avid water skier

Jeff Marsh is a Registered Representative of and offers securities products & services through NYLIFE Securities LLC, Member FINRA/SIPC, A Licensed Insurance Agency. BOLI Strategic Partners LLC is not owned or operated by NYLIFE Securities, LLC or its affiliates. Jeff Marsh is also separately registered as a Financial Adviser offering investment advisory services through Eagle Strategies, LLC, A Registered Investment adviser.

BOLI Strategic Partners

1 Suzanne Lane, Pleasantville, NY 10570-1511 - Peter Dinardi - Cell 914-772-5751
120 West 22nd Avenue, Torrington, WY 82240 - Jeff Marsh - Cell 307-532-1960
5640 11th Avenue South, Minneapolis, MN 55417— Margit Parish—612-545-5751