



COUNCIL FINANCIAL
& INSURANCE SERVICES

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**Contact: Swapan Munshi
(833) 479-2726**

**NEW YORK LIFE'S SWAPAN MUNSHI EARNS
LIFE AND ANNUITY CERTIFIED PROFESSIONAL DESIGNATION**

CALIFORNIA, June 3, 2021 – Swapan Munshi, Principal of Council Financial & Insurance Services, and agent for New York Life's Greater San Francisco General Office (CA Insurance Lic. # OK77128) has earned a Life and Annuity Certified Professional (LACP) designation. This designation is awarded by the National Association of Insurance and Financial Advisors (NAIFA) Certification Commission to experienced agents with exceptional product knowledge, demonstrated excellence in upholding legal and ethical standards, and an overall commitment to superior client service in the area of life insurance and annuities.

Agents with an LACP designation strive to uphold a higher standard of ethics by monitoring legislative regulations and updates to ensure their clients consistently receive the most accurate and compliant service that aligns with the client's best interest. They also work to thoroughly understand their clients' needs, goals, risk tolerance and values, and communicate in such a way that ensures the client is well-informed about each service and is confident with the agent's recommendations. LACP designees possess extensive knowledge of life insurance and annuities products that enable them to deliver thorough guidance and education when working with clients.

Mr. Munshi is passionate about empowering his clients with sound financial education, and in his role with Council Financial & Insurance Services, he enjoys engaging with clients and helping them understand their financial strategies so they can more effectively pursue their goals. He believes that his clients want to make wise decisions, and it's his mission to help them discover how to do so.

"I consider what I do a form of financial therapy," Munshi said. "I listen intently to my clients and help them find the best solution to their unique needs. The LACP designation is just another step to ensuring I have all the resources my clients need to make the best decisions for their future."

Mr. Munshi is principal of Council Financial Strategies and Insurance Solutions, a financial and insurance services company in San Francisco, where he specializes in serving real estate business owners and families with significant assets, as well as medical and tech professionals with insurance and financial needs. He is a member of NAIFA and a four-time qualifying Million Dollar Roundtable Member*.

Council Financial Strategies and Insurance Solutions is not owned or operated by New York Life Insurance Company or its affiliates. *The Million Dollar Round Table (MDRT), Premier Association of Financial Professionals, is recognized globally as the standard of excellence for life insurance sales performance in the insurance and financial services industry.

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