

W. THOMAS SPENCER, JR.

Founding Partner
Spencer Financial, LLC

INSURANCE | INVESTMENTS | RETIREMENT SOLUTIONS

More than 40 years experience in providing high quality products and services to help meet the financial needs of conscientious individuals and companies.

RECOGNITION AND ACHIEVEMENTS

- Award Recipient** “Albert Richardson Award”, 25th annual given by NAIFA Boston for distinguished record of outstanding personal service to the Association, the insurance industry, and the community.
- Founder & Past President** Boston Life Underwriters Charitable Foundation
- Practice of the Year 2013** National Recognition awarded to Spencer Financial, LLC by Signator Investors, Inc.
- Main Platform Speaker** One of only a few chosen to address 7,000 delegates from 37 countries at Annual Meeting of the Million Dollar Round Table in Toronto.
- TV & Radio Appearances** Featured in financial planning segment on NBC’s “The Today Show”
Featured in 3-part financial planning series on PBS broadcast “Creative Living”
Featured in life insurance segment on WBNW radio talk show “Smart Money”

MEMBERSHIPS AND INVOLVEMENT

- Charitable** Challenge Day, Fundraising & Promotion
Habitat for Humanity, Fundraising & Construction
Seeds of Peace, Fundraising & Promotion
- Member** National Association of Insurance and Financial Advisors [NAIFA]
Boston Chapter CLU & ChFC
Boston Estate Planning Council
- Chairman of the Board** Endicott College, Beverly MA, 2006-2010
- Trustee** Endicott College, Beverly MA, 2010-present
- Director** Fallon Health , Audit & Compliance Committee, Worcester MA, 2014-present

EDUCATION

Brown University, BA Degree
Charter Life Underwriter (CLU)
Charter Financial Consultant (CHFC)

SPENCER FINANCIAL, LLC

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