

Vista Planning Inc.  
410 Martin Luther King Jr Blvd  
Chapel Hill, NC 27541

Tel: (516) 425 9419  
Mobile: (516) 425 9419  
roger@vistaplanninginc.com

## Roger D. Werner, CLU, ChFC

*Financial Adviser*

*Vista Planning, Inc.*

After graduating from the University of North Carolina at Chapel Hill in 1968 with a degree in economics, Roger Werner began his career in the insurance business with Equitable Life. During his time with Equitable, Roger consistently earned honors within the company and the agency with which he was affiliated. In addition to serving clients, Roger was appointed as a District Manager responsible for the training and development of new agents. Some of those agents went on to lead the company.

In 1975 Roger earned his CLU designation from the American College and soon after earned his Chartered Financial Consultant (ChFC) designation as well. Roger is a life and qualifying member of the Million Dollar Roundtable which is the industry's pinnacle organization. He is often a Top of the Table member, which is the ultimate honor in the insurance industry. With over 45 years of experience helping clients with their various financial planning needs, Roger has built a very loyal and diversified clientele.

Roger is a member of the Corporate Registered Investment Adviser Network of Signator Investors, Inc. He also maintains membership in the National Association of Insurance and Financial Advisors.

Roger formed Vista Planning, Inc. in 1986 and together with an excellent staff focuses in providing clients with solutions for life and disability income insurance as well as assisting them with their retirement and estate planning needs. In addition, Vista Planning, Inc. helps their clients find the best products available to help solve their health insurance requirements\*. With an impressive list of group insurance carriers, and because of their vast experience, Vista Planning Inc is able to provide unique solutions for all of their clients.

*\*Health insurance is offered by third party carriers who are independent of Signator Investors, Inc.*

- Wealth Management
- Insurance Protection
- Compensation
- Estate Planning Strategy
- Retirement Planning
- Business Planning
- Business Succession Strategies

*“Lighting the Way  
to a Secure  
Financial Future”*