



# COMMONWEALTH OF MASSACHUSETTS

## DIVISION OF INSURANCE PRODUCER LICENSING

1000 Washington Street, Suite 810 • Boston, MA 02118-6200  
(617) 521-7794 • FAX (617) 753-6883  
<http://www.mass.gov/doi>

### Massachusetts Licensed Life Settlement Brokers - Individuals March 01, 2018

License #	Licensure	Individual	Address	City	State	Zip	Phone #	Email
1	2028803	06/19/2017	Adelson, Lee Jeffrey	Bulfinch Group, 160 Gould St Ste 310	Needham	MA	02494-2300	781-292-3260 lee.adelson@prudential.com
2	2005221	06/06/2016	Agel, Ronald C	49 Commonwealth Ave	Boston	MA	02116	617-504-9192 ragel279@aol.com
3	2027454	05/24/2017	Aiken, James J	237 Lexington Street, Suite 209	Woburn	MA	01801-5985	781-721-2327 jaiken@winterharborins.com
4	2049941	02/21/2018	Appel, Saul Louis	748 NE 72nd St	Boca Raton	FL	33487	617-610-1898 sappel@appelgrp.com
5	2030664	07/20/2017	Arnold, John W	149 Mountainview Road	East Longmeadow	MA	01028	413-582-0885 jarnold@gencorp-ins.com
6	2008379	08/01/2016	Barba, Carlos A	901 Brickell Key Blvd Apt 3307	Miami	FL	33131-3515	732-921-3755
7	2042041	11/22/2017	Bell, Jeffrey Jack	225 Friend St Ste 600	Boston	MA	02114-1834	860-558-2221 jbell@smithcompany.com
8	1994334	12/02/2015	Bertz, Eric G	125 Summer Street, Suite 1400	Boston	MA	02110	617-728-7434 eric.bertz@lfg.com
9	1948358	01/08/2014	Blum, Joseph F	Wealth Preservation Life & Health Ins. Agcy, 99 Derby St Ste 200	Hingham	MA	02043-4216	617-620-8503 jblum1119@aol.com
10	2026564	05/09/2017	BOWEN, PAUL WILLIAM	AMRITA FINANCIAL, INC, 7512 DR PHILLIPS BLVD	ORLANDO	FL	32819-5131	407-230-5932 PAUL@AMRITAFINANCIAL.COM
11	1942254	04/08/2013	Buerger, Alan Harry	7111 Valley Green Rd	Washington	PA	19034	215-242-0242 lhauser@coventry.com
12	2030123	07/12/2017	Clower, Robert C	11 Cape Drive, Suite 18	Mashpee	MA	02649	508-359-4358 rclower@investorscapital.com
13	1952953	03/27/2014	Coyle, David J	The Coyle Company, 20 William St Ste 200	Wellesley	MA	02481-4138	617-244-3257 jtormey@coylecompany.com
14	2007900	07/22/2016	Day, Frank Edmund	M Holdings Securities Inc, 1125 NW Couch St Ste 900	Portland	OR	97209-4129	503-559-7834
15	1955139	05/06/2014	Degregorio, Erik Ronald	337 Turnpike Rd Ste 203	Southborough	MA	01772-1760	508-485-5530 erik@penfacs.com
16	1942260	04/08/2013	Dubyk, Daniel William	805 E Willow Grove Ave, Suite #2B	Wyndmoor	PA	19063	215-233-9410
17	2001188	04/08/2016	ERWIN, CHRISTOPHER RONALD	POLICYOPTIONS, 47 DISCOVERY, SUITE 160	IRVINE	CA	92618	714-606-5141
18	2005227	06/06/2016	Fine, Matthew Adam	1101 Worcester Road	Framingham	MA	01701	508-889-6332 mfine@robertfineassociates.com
19	1942267	04/08/2013	Ganovsky, Matthew Andrew	2101 Park Center Dr, Ste 200	Orlando	FL	32835	407-296-7373
20	1942266	04/08/2013	Gersten, Allan D	Frst American Ins Und Inc, 460 Hillside Ave	Needham	MA	02494-1279	751-444-2262 jbolio@faiu.com

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21	1958872	07/14/2014	GLATTHORN, DARRYL J	EQUUS FINANCIAL CONSULTING, 78 PINE ST	NEW CANAAN	CT	06840-5408	203-966-4320	dglatthorn@equusfc.com
22	2019425	01/11/2017	Goldsmith, William J	21 Meadowlark Dr	Middleborough	MA	02346	774-213-9250	william_goldsmith@comcast.net
23	1942271	04/08/2013	Goldwasser, Willie J	One Gateway Center, Suite 901	Newton	MA	02158	617-332-6600	willie@goldwasser.org
24	2005716	06/14/2016	Goode, Peter H	867 Main Street	Manchester	CT	06040	860-985-6000	PGoode@NortheastBrokerage.com
25	2042609	12/05/2017	Gosule, Leslie Charles	480 Adams St	Milton	MA	02186	617-645-8996	les@gbj-bestcpa.com
26	1975380	02/23/2015	Greenfield, Keith D	Dover Group, 900 Washington Street, Elm Bank Horticultural Center	Wellesley	MA	02482	508-785-1240	cfournier@dovergroup.com
27	1975379	02/23/2015	Guglielmo, Daniel Albert	100 Pier 4 Blvd Unit 1704	Boston	MA	02210-1966	508-520-6778	dan@trustdesign.com
28	1956245	05/28/2014	Hallman, Jeffrey J	c/o Asset Life Settlements, LLC, 1507 Park Center Drive, 1B	Orlando	FL	32835	888-335-4769	jhallman@alsettlements.com
29	2024449	04/04/2017	Hanifin, Donald Edward Jr.	161 Wenonah Road	Longmeadow	MA	01106	860-808-9729	donhanifin@comcast.net
30	2030663	07/20/2017	Happy, Derek P	1 West Boylston St. Suite 101	Worcester	MA	01605	774-535-1090	derek.happy@gmail.com
31	2002093	04/26/2016	HARVEY, Mary	26949 CHAGRIN BLVD #204	BEACHWOOD	OH	44122	216-595-1441	mhplan@aol.com
32	1946316	11/25/2013	Hayes, Joseph William	100 Andover Bypass Street, Suite 201	North Andover	MA	01845	978-777-5251	jhayes@bostonhilladvisors.com
33	1942262	04/08/2013	Haynie, John R Jr.	Life Insurance Settlements Inc, 1180 SW 36th Ave Ste 201	Pompano Beach	FL	33069-4837	954-523-9995	
34	1994335	12/02/2015	Heins, Morris George					317-584-0243	
35	1950528	02/14/2014	HOES, LAUREL C	225 Village Glen Way	Mount Holly	NC	28120-9258	980-277-8158	Laurelhoes@gmail.com
36	1994115	11/25/2015	HOLAN, HARRY HAL	264 Spartan Dr	Maitland	FL	32751-3430	407-523-1871	
37	2021370	02/14/2017	Houchins, Eugene E III	3295 River Exchange Dr Ste 350	Norcross	GA	30092-4238	678-336-5250	gene@thirdfinancialinc.com
38	2029179	06/26/2017	Hufnagle, Kevin B	Baystate Fin Svcs, 20 Congress St	Marshfield	MA	02050-2746	781-834-6667	
39	1956610	06/03/2014	Kadelski, Bradford Jay	15 W Brookfield Rd	Brookfield	MA	01506-1532	508-868-6765	brad@brookfieldpartners.com
40	1942265	04/08/2013	Kaplan, Loretta	3344 Hirschi Ave	The Villages	FL	32163-0065	954-295-2768	kapl1859@bellsouth.net
41	1949839	02/04/2014	Kaye, Howard S	Howard Kaye Insurance Agency, 1800 N Military Trl Ste 170	Boca Raton	FL	33431-6386	561-488-2335	hkaye@howardkayeinsurance.com
42	2014746	10/18/2016	Kelly, Kenneth A	77 W Washington St Ste 515	Chicago	IL	60602-3289	704-975-2047	
43	2022133	02/27/2017	Kizer, Gregory J	2828 S 87th Street, Po Box 241629	Omaha	NE	68124	402-614-2330	
44	1956870	06/06/2014	Krochmal, Stephen Glenn	Ameriprise Financial Services Inc, 100 Pringle Ave Ste 420	Walnut Creek	CA	94596-7385	925-280-4444	Steve.krochmal@ampf.com
45	1974049	02/02/2015	LANCASTER, ANTHONY	3535 Grandview Pkwy Ste 600	Birmingham	AL	35243-1936	205-263-4400	licensing@highland.com
46	1970114	12/01/2014	Largent, Ellis J	Opulen Ventures Inc., 1600 Rosecraws Blvd, Building 7 Floor 4	Manhattan Beach	CA	90266	0-- 0	
47	2009555	08/17/2016	Lea, Jason E	500 South Main St	Providence	RI	02903	401-751-9400	
48	2007343	07/13/2016	LeClair, Paul L	200 Clarendon St Ste 19	Boston	MA	02116-5039	508-880-2078	
49	1950786	02/19/2014	Macina, Christopher J	800 South Street, Suite 650	Waltham	MA	02453	508-624-9785	chris@leismaninsurance.com
50	2035969	09/27/2017	MAHOLCHIC, RICK SCOTT	21021 VENTURA BLVD STE 400	WOODLAND HILLS	CA	91364-2241	818-597-1297	

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51	2035968	09/27/2017	Masur, James E	C/o Cross Coastal Advisors, 101 Federal St Ste 800	Boston	MA	02110-2038	617-526-9311	
52	2028806	06/19/2017	McKechnie, David Scott	3 Heritage Way, Suite 2	Gloucester	MA	01930	978-283-4433	david@beauportfinancial.com
53	2029178	06/26/2017	Medalie, Seth	Bulfinch Group, 160 Gould St Ste 310	Needham	MA	02494-2300	781-449-4402	loretta_becker@glic.com
54	1942257	04/08/2013	Mendelsohn, Jason Todd	1800 Pembroke Dr #240	Orlando	FL	32810	407-782-5614	
55	1942264	04/08/2013	Mendelsohn, Jon B	1800 Pembroke Dr Ste 240	Orlando	FL	32810-6374	407-386-8440	
56	2016655	11/17/2016	Meyer, Edward Keith	Himmelstein & Associates, 56 Kearney Rd Ste B	Needham	MA	02494-2507	617-243-0668	emeyer@jmhinsurance.com
57	1977476	03/20/2015	Mingolelli, Michael Anthony Jr.	Reservoir Corporate Cente, 144 Turnpike Rd Ste 110	Southborough	MA	01772-2138	781-489-5614	gmcnulty@e-pfg.com
58	1963564	09/17/2014	Moynihan, James Joseph	306 Main St	Worcester	MA	01608	508-753-4887	jim@mswfp.com
59	2017770	12/08/2016	PARSONS, JOHN CLIFTON	21021 VENTURA BLVD, 400	WOODLAND HILLS	CA	91364	818-702-0889	
60	1956241	05/28/2014	Payne, William Arthur	1 Pine Hill Drive #502	Quincy	MA	02169	617-745-0910	
61	2022134	02/27/2017	Pessotti, Thomas J	44 Sunset Dr	Burlington	MA	01803	781-272-9045	tjmap@hotmail.com
62	1993897	11/20/2015	Polter, Yochannon E	Polter Financial Group, 26999 Central Park Blvd #225	Southfield	MI	48076	0-- 0	
63	2029180	06/26/2017	Porter, David Craig	Baystate Fin Svcs, 200 Clarendon St Ste 19	Boston	MA	02116-5039	617-585-4501	dporter@baystatefinancial.com
64	1987940	09/03/2015	Raven, Rhonda Verity	65 Madison Avenue, Suite #200, P.O. Box 1940	Morristown	NJ	07962	973-200-4766	
65	2028805	06/19/2017	Reed, Derek Jason	3 Heritage Way, Suite 2	Gloucester	MA	01930	978-626-1122	derek@beauportfinancial.com
66	2005718	06/14/2016	Rochford-Mitchell, Maureen Ann	Innovative Underwriters Inc, 1800 John F Kennedy Blvd Ste 700	Philadelphia	PA	19103-7404	732-361-3122	mmitchell@innovativeunderwriters.com
67	2016079	11/07/2016	ROGAT, Kenneth Lee	5885 LANDERBROOK DRIVE, SUITE 200	CLEVELAND	OH	44124-4031	440-683-9222	Krogat@cedarbrookfinancial.com
68	2026563	05/09/2017	Roney, John Michael	Roney & Company, 140 S Lake Ave Ste 372	Pasadena	CA	91101-4789	626-795-9590	
69	2031709	08/04/2017	Rybka, Lawrence J	130 Springside Dr Ste 300	Akron	OH	44333-2489	330-576-1234	Terri.Bryan@valmarksecurities.com
70	1977486	03/20/2015	SHORROCK, STEPHEN J	Veris Settlement Partners, Inc., 200 Grant St	Centerport	NY	11721-1250	516-428-3731	steve@lifeventurescorp.com
71	1990759	10/05/2015	Smalls, Lester	1415 Foulk road #103	Wilmington	DE	19803	302-764-5279	llocke@epdv.com
72	1946044	11/19/2013	Stark, Robert	3255 NW 94th Ave Unit 8532	Coral Springs	FL	33075-2027	917-714-6667	
73	1949021	01/21/2014	Stensing-Woods, Ellen Lea	747 Wood St	Swansea	MA	02777	508-965-4587	estensingwoods@aol.com
74	1958290	07/02/2014	Stone, Joseph	35 Wanders Drive	Hingham	MA	02043	781-749-6926	joe@stonefinancialgroup.net
75	1942261	04/08/2013	Sullivan-May, Jean	72 Sharp Street, Suite A2	Hingham	MA	02043	508-785-0096	jsmay90@verizon.net
76	1959410	07/23/2014	Swallow, Russell E	219 Clover St	Worcester	MA	01603	508-831-0805	russ@benefitslab.com
77	2035970	09/27/2017	Waintrup, Daniel I.	381 Warren Street, Box 02445	Brookline	MA	02445	617-566-2122	
78	1942256	04/08/2013	Watson, Stephen Maclaren	2 West Runswick Drive	Richmond	VA	23238	804-564-9469	

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79	2010468	08/25/2016	Weinberger, Robin Sue	Robin S. Weinberger, Clu, Chfc, Cltc, 220 Boylston St Apt 1204	Boston	MA	02116-3950	617-451-3343	RSW220@aol.com
80	1948474	01/09/2014	Weiss, Noam Simon	3260 Fairlane Farms #3	Wellington	FL	33414	0-- 0	
81	1942253	04/08/2013	Welcom, John Michael	WELCOME FUNDS INC, 6001 BROKEN SOUND PKWY STE 320	BOCA RATON	FL	33487-2754	561-212-8993	
82	1942269	04/08/2013	Wilcher, Linda S	12103 Sagamore	Lenwood	KS	66209	0-- 0	
83	1951637	03/06/2014	Youngentob, Stuart L	Arkin Youngentob Associates, Llc, 7500 Old Georgetown Rd Ste 1225	Bethesda	MD	20814-6133	301-424-4527	kstevens@ayallc.com