

Michael Sosnowski

CFP®, CLU®, ChFC®, RICP®

Director, Advanced Markets



MIKE SOSNOWSKI brings more than 15 years of financial services experience to his role with Transamerica's Advanced Markets Group. With a passion for helping financial professionals build their business, Mike joined Transamerica as an internal wholesaler in 2008 before moving to Advanced Markets in 2012.

His experience allows him to travel the country presenting advanced financial planning strategies involving Social Security, Medicare, estates/trusts, qualified plans, and IRAs. A certified Continuing Education (CE) instructor, Mike also contributes to the ongoing development of Transamerica's internal financial planning classroom curriculum.

Mike is a Certified Financial Planner™ (CFP®), Chartered Life Underwriter® (CLU®), Chartered Financial Consultant® (ChFC®), Retirement Income Certified Professional® (RICP®), and graduate of Colorado State University. He holds FINRA Series 6, 7, and 63 registrations, as well as a Colorado life insurance license.

When he's not traveling the country presenting advanced financial planning strategies, he enjoys spending time with his wife and two children.

Background

CURRENT RESIDENCE

Castle Rock, CO

EDUCATION

Colorado State University, Bachelor's Degree in Exercise and Sports Medicine

HOMETOWN

Bayonne, NJ

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™, and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Securities offered by Transamerica Capital, Inc. (TCI), 1801 California Street, Ste 5200, Denver, CO 80202. FINRA member.

At a glance

- Joined Transamerica in 2008
- 10+ years of financial services industry experience
- Featured speaker on advance financial planning strategies

Accreditations

- Certified Financial Planner™ (CFP®)
- Chartered Life Underwriter® (CLU®)
- Chartered Financial Consultant® (ChFC®)
- Retirement Income Certified Professional® (RICP®)
- FINRA Series 6, 7 and 63 registrations
- Colorado Life Insurance License

Get in touch



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VISIT

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