1847 Private Client Group

Michael DeFillipo, CLU®, ChFC®

PARTNER

APPLYING TECHNICAL EXPERIENCE TO SOPHISTICATED STRATEGIES

contact

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education

- B.S. Biology, Swarthmore College
- Series 7, 63, 65, 66
- Life and Health Licenses
- Chartered Life Underwriter® (CLU®)
- Chartered Financial Consultant® (ChFC®)

areas of expertise

- Wealth Accumulation Strategies
- Retirement Strategies
- Personal Financial Analysis
- Business Succession Strategies
- Estate Planning
- Wealth Transfer

industry organizations

- Member, Finseca (formally AALU, the Association of Advanced Life Underwriters)
- Board of Directors (term expiring 2024), Philadelphia Estate Planning Council

about

Michael DeFillipo joined 1847Financial in August 2016. He builds lifelong relationships with clients to provide creative and valuable solutions for every stage of life. Michael's clients continue to work with him due to his passion, dedication and commitment to being a resource for their financial security.

Michael is a 2004 graduate of Swarthmore College with a degree in Biology. He has been involved in the insurance and advisory industry since his graduation. Currently, Michael holds a Life Accident and Health, Series 65, 63, 6 and 7 Licenses. He received his Chartered Life Underwriter (CLU®) designation from The American College of Financial Services in 2017 and his Chartered Financial Consultant (ChFC®) designation in 2019. Michael is also an active participant in the Philadelphia Estate Planning Council, authoring several articles for the Council's Newsletter and has been a speaker at several industry marketing events.

Today Michael resides in Rydal, PA with his wife Kearney and their dog, Basil. He played club rugby, varsity baseball and varsity football while attending Swarthmore College. When Michael is not hard at work, you can find him deep in thought about baseball analytics, cooking on the grill, or spending time at home working outdoors.

media and publications

- Money Matters TV – Guest speaker
- "2017 Life Insurance Trends" - 2017 Spring Philadelphia Estate Planning Council Newsletter
- "An Insider's Guide to a Life Insurance Proposal" - 2018 Winter Philadelphia Estate Planning Council Newsletter
- "Pre-Retiree Retirement Planning – Managing Volatility, Taxes & Future Needs" 2019 Fall Philadelphia Estate Planning Council Newsletter
- "Term Insurance, Beyond the Pricing" 2019 Winter Philadelphia Estate Planning Council Newsletter
- "Long Term Care Planning" – 2020 Summer Philadelphia Estate Planning Council Newsletter
- "Impact of COVID-19 on the Life Insurance Industry" – 2020 Fall Philadelphia Estate Planning Council Newsletter
- "A Wait-and-See Legacy Planning Approach: Maintain Flexibility While Getting a Foot in the Door" – 2021 Winter Philadelphia Estate Planning Council Newsletter