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The Bank Insurance & Securities Association, at its Annual Meeting at the Westin Diplomat Hotel in Hollywood, Florida, announced that Dan Overbey has been awarded Lifetime Achievement recognition for his service to the Association. The BISA, based in Washington D.C., is the largest association of financial institutions engaged in wealth management.

Overbey, who leads Fort Lauderdale-based Private Wealth Alliance, served as immediate past president of BISA and has served on the board for 15 years. Dan has led numerous association-wide initiatives during his tenure as a board member.

Dan's career spans 30 years in the financial institution channel, and he has been a speaker and participant at a number of industry roundtables. In 2016, his firm announced a joint venture with Independent Financial Partners in Tampa, Florida. Together, they provide wealth management services to individuals and institutions across a national footprint. The firm is comprised of 500+ advisors across 39 states.

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