



ROBERT D. MERZ, CLU, ChFC, MSFS

Robert D. Merz began his insurance career in Oregon in 1970. In 1975, he was appointed Seattle Branch Manager for Manhattan Life of New York. He opened The Merz Agency's Seattle office in 1978. The Merz Agency is a third-generation family owned multi-carrier life insurance brokerage serving the Pacific Northwest since 1958 with offices in Portland and Bellevue.

He holds a Bachelor of Science in Business from Portland State University. He pursued his graduate studies at The American College in Bryn Mawr, Pennsylvania and earned a Masters of Science in Financial Services. He is a Chartered Life Underwriter and a Chartered Financial Consultant.

He is a current member of the Life & Disability Agent / Broker Advisory Committee to the Washington State Office of Insurance Commissioner. He is the Past President of the East King County Estate Planning Council, the Seattle Society of Financial Service Professionals and the Eastside Association of Insurance and Financial Advisors. He has taught both the personal insurance and business insurance courses for the Life Underwriters Training Council. He is utilized as an expert witness in Errors and Omissions litigation to establish the level of expertise required of life insurance agents practicing in the business and estate markets. He is licensed in CA, OR and WA.

Bob and Sharon have been married 48 years and reside in Kirkland. With three children and 10 grandchildren, family is their primary focus. Bob is an avid golfer and soccer player. He also enjoys gardening and driving his 1941 Ford Coupe.

September 2018