



Forrest Millheim, CLTC®

Wealth Solutions Advisor

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BIO

Forrest Millheim began his career in financial services in 2002 with an independent agency in Las Vegas, Nevada. He learned the ins and out of the insurance and retirement plan industry at a young age from two wonderful mentors and immediately dove in head-first when he realized this career would allow him to bring a sorely needed service to so many people.

Forrest relocated to Salt Lake City, Utah in 2008 when his children started school. He spent several years working with large national insurance and investment brokerages as a product specialist and regional vice president. After spending a few years “on the road”, coaching and educating other advisors all over the country on best practices and strategies with their clients, he decided to shift his focus to work directly with individuals, families, and business owners in his community and in Nevada where he started.

Forrest has always focused on each client’s situation as a unique puzzle to solve. With his experience at the corporate level as well as in the field, he is able to utilize strategies involving insurance, long-term care, annuities, and other arrangements to tailor effective solutions for each individual.

In 2020, as planning to avoid a nursing home became an increasing concern for so many Americans, Forrest acquired his CLTC® designation to specialize in planning for long-term care, as well as for retirement. In his off time, Forrest spends his time hiking the mountains of Utah and snowboarding with his kids.

Retirement Planning | Long-Term Care | Life Insurance

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