The Nautilus Group®

The Nautilus Group®, located in Dallas, TX, is staffed by an experienced team of professionals with credentials in law, taxation, accounting, business, insurance, finance and philanthropic planning. This premier team is among the finest in the industry, providing dedicated support in business and estate planning for an elite group of Nautilus Member Agents.

CEO Brooke Zrno Grisham, CLU®, AEP®

Richard Baier, JD, CLU®, ChFC®, AEP®, CRPC, CFP®, FLMI, CAP®

James S. Barry, JD, LL.M., CLU®, ChFC®

Todd Beaird, JD, LL.M.

Bart Bradshaw, JD, CLU®

Amanda Chang, JD, LL.M.

Britney Zollinger Clark, JD, CFP®

Heather Davis, JD, CLU®, ChFC®

Carolyn B. England, JD

Karen Fishell, CLU®

Richard Holman, JD, CFP®, CLU®

Eva Kardosi, JD, LL.M.

Michelle M. Kenyon, JD, CPA

(Robert) Matt Pate, JD, LL.M.

Corbett Ray, MBA, CFP®

Kathryn Rodgers, JD, LL.M.

Gib Surles

CLU®, ChFC®, CFP®, AEP®, MSFS

Mr. Surles graduated from Texas A & M University in 1985 with a B.B.A in Marketing and received his Masters of Science in Financial Services (MSFS) from The American College in 2001. He was awarded the Chartered Life Underwriter (CLU®) in 1996, Chartered Financial Consultant (ChFC®) in 1997, Certified Financial Planner (CFP®) in 1997, and the AEP® in 1999.

Gib joined the New York Life Insurance Company as an agent in June 1985 and while maintaining his primary relationship with them, he formed The Forrest Group, L.L.C. in 1995. He is a life and qualifying member of The Million Dollar Round Table (MDRT)* and is a Past President of The Houston Chapter of the Society of Financial Service Professionals (SFSP), and a board member with the Houston Estate and Financial Forum (HEFF), where he was elected President for the year 2012-2013. He received the Benjamin N. "Woody" Woodson Award for outstanding service to the community and insurance industry in 2011. Gib has been a national leader in the Association for Advanced Life Underwriting (AALU), where he served as President from 2011-2012. Gib received the John N. Neighbor's Award for his special dedication to the National Association of Insurance and Financial Advisors (NAIFA), the insurance industry and the community in 2013.

THE FORREST GROUP, LLC
ESTATE MANAGEMENT®

Our Firm

The Forrest Group, LLC is an estate management firm in Houston, Texas, that primarily focuses on privately held business owners, high net worth individuals, and affluent families. Our firm specializes in wealth transfer and business succession planning. We address problems common to the transfer of wealth, lifestyles and financial security to future generations. We assist our clients in obtaining the peace of mind they desire through our objective driven process.

Nautilus Member Agents

Nautilus Member Agents are a carefully selected group of industry professionals who work with affluent families and business owners on estate, business and charitable planning objectives.

Working hand in hand with the in-house team of professionals, Member Agents can provide their clients with state-of-the-art planning strategies and customized case analyses designed to enable clients to meet their goals.

The Nautilus Group provides a range of consultative services and technical case design to support its Member Agents in presenting complex estate, business, charitable, and insurance strategies to their clients and their clients' advisors in these key areas:

- Family Protection
- Estate and Legacy Planning
- Business Succession and Exit Planning
- Executive Benefits
- Philanthropy

The Forrest Group, LLC
2121 Sage Road, Suite 355
Houston, TX 77056
713-572-0091
fsurles@eaglestrategies.com

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