



Bill Heidt, LUTCF, CSFS

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Background & Experience

For the past 14 years, Bill Heidt has been assisting Financial Advisors and their clients with the advanced uses of life insurance within the scope of estate, business, charitable, and tax diversification planning strategies. Bill is an expert in understanding his clients' goals and objectives, case design, and implementation of complex strategies for families of significant wealth, entrepreneurs, and professionals. This normally involves working with a client's advisory team (financial, legal, and tax) to establish, fund, and leverage multigenerational wealth strategies, frequently in tandem with philanthropic techniques.

Bill graduated college with an emphasis in accounting and a minor in finance. Additional designations include LUTCF, CSFS, and he is currently studying for CLU. He also has FINRA Series 7, 6, and 63 licenses.

Certifications & Education

- College degree with emphasis in accounting and minor in finance
- Life Underwriter Training Council Fellow, LUTCF
- Certified Self Funding Specialist, CSFS
- FINRA Series 7, Series 6, and Series 63 Licenses