



**Trey Fairman, J.D., LL.M.**

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With over two decades of education and work experience in his area of expertise, Trey is uniquely qualified to understand and assist his clients with the challenges of today's wealth-planning environment. He has earned a Bachelors of Science in Finance from the University of Delaware and his law degree (J.D.) from the University of San Diego. After passing the California bar exam, Trey returned to the University of San Diego to obtain his Master of Laws of Taxation (LL.M.) in 2001.

Trey focuses on partnering with major financial institutions, banks, independent advisor groups, and associations to provide wealth and insurance planning services to their clients and members. He additionally collaborates with many attorneys and accountants, assisting them with sophisticated strategies for high net worth families.

Trey began his financial services career as a Brokerage Representative for Connecticut Mutual Life in 1993. He has been a top performer in the past with the R.E. Lee Group, Highland Capital Brokerage and Millennium Brokerage Group. He currently leads the institutional division at Underwriting Services of America (USA) in Rancho Santa Fe, California.

**EDUCATION**

- University of Delaware, Bachelors of Science in Finance
- University of San Diego, J.D.
- University of San Diego, Master of Laws of Taxation