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Jeff specializes in Estate planning, Business Continuation, and Wealth Transfer Strategies. Jeff works with clients and their advisors to create and fund estate plans, establish and fund asset transfer strategies, and structure business continuation plans. This entails life insurance and/or disability insurance planning for both individuals and businesses. Jeff has worked with clients with a range of assets and unique planning challenges including ultra-high net worth individuals, professional athletes, and family offices.

EDUCATION

- College/University, Town, State
Degree (B.A., B.S., etc.) Major, Year of Graduation