PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

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Background & Experience

Kurt is a Managing Partner of Financial Strategies Group, LLP (FSG), a member of Professional Life Advisors Network (PLAN) and founder of Estate and Trust Services Group, LLC (ETSG). Kurt's expertise centers on supporting the Advisors of the Financial Securities industry. His background and over 35 years of experience in estate planning, taxation, finance, and investments, makes him an excellent resource for helping identify and solve the complex issues associated with the client's financial needs. His areas of proficiency include:

- **Wealth Preservation and Transfer:** Comprehensive Financial & Estate Planning, Asset Protection, Charitable Planning, Life Insurance Strategies and issues associated with a Disability or other Long-Term illness
- **Wealth Accumulation:** Qualified and Non-Qualified Retirement Planning and Retirement Distribution Strategies
- **Business Planning:** Buy-Sell Agreements, Business Continuation and Transition Planning, Key Person Planning, Deferred Compensation and Group Benefits

Prior to FSG, Kurt managed the Wells Fargo Business and Estate Planning Department for the Florida territory. He was a managing member of the Prudential Securities (Wachovia Securities) Estate Planning Council. Kurt was the Estate Planning Consultant for Smith Barney in suburban New York and was a Regional Estate Planning Specialist for Merrill Lynch in suburban New York City and the Washington, DC territories.

Kurt is a qualified continuing education instructor for attorneys, CPAs and financial professionals. He lectures on a variety of financial, insurance, taxation and estate planning concerns in client and broker seminars and has appeared on various television and radio programs concentrating on taxation, finance, insurance strategies and estate planning. He has also written a series of articles for the Alzheimer's Association addressing issues concerning "Estate Planning for Long-Term Care". Additionally, Kurt has written for university and nonprofit publications on the topic of "Charitable Giving and Wealth Replacement Planning".

Kurt holds an MBA from Loyola University, Chicago, and is a graduate of Miami University of Ohio. He earned the following designations from the American College, Bryn Mawr, PA.: Chartered Financial Consultant (ChFC) and Certified Life Underwriter (CLU). Kurt holds life, accident and health licenses, in multiple states as well as Securities licenses, series 7 and 63 registrations. He is a past member of the International Forum, and the Society of Financial Services Professionals (FSP).

Military Service: US Army Engineer Officer, Ranger, Airborne Qualified