



Rick Wien

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Background & Experience

Rick Wien specializes in advanced life insurance and disability insurance planning, as it relates to estate preservation, business succession and philanthropy. Clients include, among others, principals of private equity firms and hedge funds, senior management of Fortune 500 companies, entrepreneurs, senior partners at international law and accounting firms, actors, models, professional athletes, producers, screen writers and authors.

Rick communicates with Financial Advisors, their clients, and the clients' attorneys and CPAs to ensure effective coordination of the various legal and financial disciplines, from both a business and personal perspective. He regularly performs forensic reviews of clients' life insurance portfolios to maximize leverage, minimize exposure to equity risks and improve tax efficiency. Rick has helped navigate insurance and estate tax planning for US expats overseas and for non-US citizens living and working in the US.

Rick and his family are active in fundraising for the Leukemia & Lymphoma Society. He has served on the Board of Directors of the Wharton School Alumni Association, and as the Executive Vice President of the Wharton Club of NY. Rick is also a member of the National Association of Insurance & Financial Advisors. He has a wife and three children. They all enjoy traveling, skiing, tennis, and long-distance running.

Certifications & Education

- Harvard Business School, Boston, Massachusetts - MBA
- Wharton School, University of Pennsylvania, Philadelphia, Pennsylvania - B.S.