



## Steve Schaumberger

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Steve Schaumberger is the founder and managing partner of 1961 Advisors ([www.1961advisors.com](http://www.1961advisors.com)). He has been providing innovative insurance solutions for 25 years, working closely with high net worth individuals, advisors and companies to mitigate taxes, protect assets and transfer wealth on a cost-effective basis. Steve has spoken extensively on planned giving and philanthropy and authored a number of articles, including Insurance Arbitrage, Mitigating the Triple Tax Whammy, Creating a Framework to Control Costs, and Seeing the Forest Through The Trees: A Look at Turnover Costs on a Company's Bottom Line.

Steve has a tremendous network and is a true connector with a "pay-it-forward" approach. He is a graduate of the University of Michigan and the Harvard Business School and currently serves as the president of the Harvard Business School Club of Chicago. Additionally, Steve is a member of the Economic Club of Chicago, the Chicago Estate Planning Council, the JUF Professional Advisory Committee, the Association for Corporate Growth, the Greater North Shore Estate & Financial Planning Council and the Annual Fund of Ravinia Festival.

### **EDUCATION**

- University of Michigan
- Harvard Business School