



Steve Schumacher, CFP®

BKA Financial
244 West Water St.
Suite 200
Elmira, NY 14901
Email: sschumacher@bkafinancial.com
Phone: 607-732-3050
Fax: 607-732-3050

Steve Schumacher brings over 35 years of experience serving the insurance needs of wealthy families, business owners, and their related entities to provide them with tax efficient liquidity and peace of mind. His extensive knowledge and analyzing of advanced life insurance strategies and their applications allows him to work closely with your entire wealth management team to execute the program best suited to meet your objectives.

Steve began his career with CIGNA Financial Advisors where he worked exclusively with high net worth business owners in the areas of estate planning and business succession planning, focusing on a team-based approach with the client's attorneys and CPAs. He joined Wells Fargo in 1999 where he spent the next 20 years as a Wealth Insurance Specialist working with Wells Fargo Advisors and Wells Fargo Private Bank. He focused on wealth transfer strategies, wealth accumulation and supplemental income planning, specifically for high income and high net worth clients. Steve has been a top performing insurance specialist; he has received many accolades including production leader and serving on the Insurance Advisory Council. He is recognized as an insightful thought leader and valued member of the financial planning community, sharing his expertise and walking through case studies with other advisors.

Steve is married and lives in Tampa with his wife, Carmen Inés. He has three adult children and six grandchildren. Steve enjoys all sports, particularly golf, exercising and travel.

EDUCATION

- University of Kansas- Lawrence, Kansas