



## **Steven Spector**

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Steven Spector is a specialist in the design and implementation of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques.

Financial Services experience since 1991 with specialization in estate, wealth, charitable and business succession and executive compensation planning for high net worth families, business owners and senior executives with estates ranging between \$7 million and \$2 billion.

Previously, Steven worked as a Managing Partner with Spectrum Financial Services and as a Life Insurance and Estate Planning Specialist at Chase Bank- Private Bank and Middle Market Division.

### **EDUCATION**

- Queens College, CUNY, Queens, NY  
BA, Business Communications