



Steve Schaumberger

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Background & Experience

Steve Schaumberger is the founder and managing partner of 1961 Advisors (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.

Certifications & Education

- University of Michigan
- Harvard Business School