



Zach Siegel, CFP®

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Background & Experience

Zach provides personalized insurance design and planning services to the affluent.

Prior to joining American Business in 2003, Zach was responsible for private client planning with UBS Financial Services at their Wall Street Complex.

Zach completed his Certified Financial Planning® credentials in 2006 via Boston University. His areas of expertise include insurance policy forensic analysis, estate planning, high-income disability income protection, business succession planning, and advanced pension design.

He excels at integrating professionally with advisors at investment banking firms, law firms, and business management firms. A natural collaborator, he leads a team of professionals responsible for delivering uncompromising service and professional expertise.

He is an industry educator and has been a panel speaker for LIMRA. Zach is married with two children and lives in Santa Barbara, California.