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Kurt is a Managing Partner of Financial Strategies Group, LLP (FSG) and founding partner of Estate and Trust Services Group, LLC. With over 29 years' experience in estate planning, taxation, finance and investments, he is an excellent resource for helping identify and solve the complex issues associated with a client's financial needs. His areas of proficiency include wealth preservation and transfer, wealth accumulation and business planning. Prior to FSG, Kurt managed the Wachovia Securities Business and Estate Planning Department for Florida. He was a managing member of the Prudential Securities Estate Planning Council, the Estate Planning Consultant for Smith Barney in suburban New York, and a Regional Estate Planning Specialist for Merrill Lynch in suburban New York and Washington, DC.

Kurt is a qualified continuing education instructor for attorneys, CPAs and financial professionals. He lectures on a variety of financial, insurance, taxation and estate planning concerns in client and broker seminars and has appeared on various television and radio programs. He has written a series of articles for the Alzheimer's Association as well as university and non-profit publications. Kurt holds life, accident and health licenses in multiple states and Series 7 and 63 registrations. He is a prior member of the International Forum and Society of Financial Services Professionals.

EDUCATION

- Miami University of Ohio, Oxford, OH
BS
- Loyola University, Chicago, IL
MBA
- The American College, Bryn Mawr, PA
Chartered Financial Consultant (ChFC[®]) / Chartered Life Underwriter (CLU[®])