



**William J. Schulz, JD**

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Bill is a licensed attorney with over 25 years of experience in the areas of estate planning and insurance. Early in his career, he spent six years as corporate counsel for an insurance agency in Cleveland, Ohio. He worked for over 15 years as an estate planning attorney, working specializing in wealth transfer, asset protection, business succession, and special needs planning. Prior to joining Underwriters Brokerage Service, Bill was an Estate and Business Planning Consultant with Hartford Life Insurance. As an Insurance Consultant at Underwriters Brokerage Service, Bill partners with Financial Advisors interested in deepening their relationships with their current clients and developing new client relationships. He attends to each advisor's individual business needs, including: policy review, insurance policy case design, point-of-sale assistance, estate and business plan review, as well as innovative marketing strategies.

Bill enjoys travel, auto racing, and cooking for friends and family.

**EDUCATION**

- Miami University, Oxford, OH
- University of California, Hastings College of the Law, San Francisco, CA