EXPERIENCE.

EXPERTISE.

SOLUTIONS.

RANDY PABICH

CLU® | ChFC®

PLANNING SPECIALIST

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MERCURY FINANCIAL GROUP

EXPERIENCE. EXPERTISE. SOLUTIONS.

Randy Pabich provides sophisticated, client-tailored, tax-efficient estate, asset protection, business succession and charitable planning strategies to the high net worth clientele of many highly regarded financial institutions in the United States. His responsibilities include face-to-face meetings with clients and their financial advisors to assess planning needs and objectives, analyze supplied data and develop strategies for plan implementation through client-selected practitioners.

PROFESSIONAL HIGHLIGHTS

With over 25 years of financial planning experience, Mr. Pabich has worked in tandem with some of the nation's top estate attorneys in the development of planning concepts that utilize newly created entity structures, securities, specialized trusts and insurance. Mr. Pabich, through a collaborative and consultative approach, is dedicated to helping financial advisors and their clients navigate life insurance, asset transfers, estate and business planning.

Mr. Pabich is a frequent keynote speaker at various training and education seminars for financial advisors and is very comfortable discussing small business owner strategies and complex wealth transfer concepts, including estate planning, charitable giving, income replacement, retirement, and long-term care concerns.

PREVIOUS EXPERIENCE

Regional Insurance Planning Specialist – Raymond James Insurance Group
Nationally top-ranked specialist responsible for providing comprehensive estate and insurance planning solutions for high net worth clients.

Dedicated Life Consultant – Prudential Financial
Partnered with Financial Advisors to profile Life Insurance candidates and tailor individual solutions.

Dedicated Life Consultant – The Hartford
Stellar track record of providing sophisticated solutions to client's protection and legacy concerns.

EDUCATION | DESIGNATIONS | LICENSES

Bachelor of Arts, Political Science – University of Illinois, Urbana-Champaign

Chartered Life Underwriter (CLU) – The American College

Chartered Financial Consultant (ChFC) – The American College

FINRA Series 7 and 63 licenses. A Registered representative of The Leaders Group, Inc. Member FINRA

10-time member of Hartford Life's President's Club

2-time Chairman's Club Recipient

Received Hartford's most elite awards, The Honor's Club and The Ring of Excellence

WEALTH TRANSFER ▪ BUSINESS SUCCESSION ▪ CHARITABLE GIFTING ▪ EXECUTIVE COMPENSATION PLANS ▪ WEALTH STRUCTURING