

EXPERIENCE.
EXPERTISE.
SOLUTIONS.

STEVEN SPECTOR

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WEALTH ADVISORY GROUP

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Steven Spector is a specialist in the design and implementation of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques.



PROFESSIONAL HIGHLIGHTS

Financial Services experience since 1991 with specialization in estate, wealth, charitable and business succession and executive compensation planning for high net worth families, business owners and senior executives with estates ranging between \$7 million and \$2 billion.

PREVIOUS EXPERIENCE

Managing Partner, Spectrum Financial Services, 1990 - 2012

Life Insurance and Estate Planning Specialist, Chase Bank- Private Bank and Middle Market Division

EDUCATION | DESIGNATIONS | LICENSES

Queens College – BA, Business and Communications

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

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