



## Schechter Financial Group

"We chose to partner with **Schechter Financial Group** predominantly because of their impeccable reputation, integrity and ability to understand our clients' needs. In addition, their technical expertise and creative thinking in the estate planning and wealth transfer arena are second to none."

### **Bruce Kridler**

*Senior Vice President  
Huntington Bank  
Private Financial Group*

Introducing **Schechter Financial Group**, our experts in estate planning, insurance and wealth transfer strategies.



*Robert V. Schechter  
MBA, CLU, ChFC  
Chairman*



*Jason Zimmerman  
MBA, CLU  
Executive V.P.*



*Marc Schechter  
Executive V.P.*



*Robert Heinrich  
J.D.  
V.P. of Wealth  
Services*

Schechter Financial Group is proud to be a strategic partner with Huntington Bank. Schechter Financial Group consists of three distinct divisions: Schechter Insurance Advisors, Schechter Benefits Advisors, and Schechter Wealth Strategies. For over sixty years, the Schechter companies have been serving the insurance needs of high net worth individuals and their families. They have built their company based upon effectively utilizing their expertise and experience to assist sophisticated clients develop solutions that meet their insurance, estate planning, wealth transfer planning and family protection needs. Today, Schechter Financial Group consists of 25 individuals, including lawyers, CPA's, MBA's, and individuals who have built and run businesses in a number of different industries.

Schechter Financial Group understands the intricacies of insurance products and trusts, as well as estate, gift and income tax laws. Their greatest strength lies in their ability to help the client define their personal and family goals, understand family dynamics and recognize their opportunities. Of equal importance is their ability to work with the client's professional advisors (i.e. attorneys and accountants) to get the job done together as an efficient and effective team.

In their role as client advocates, Schechter Financial Group maintains independence from insurance companies and product providers. They do not align themselves with any one insurance company; on the contrary, they shop the market exhaustively to find the best products and prices for their clients. Because of the quality of their clients and volume of their business, Schechter Financial Group has influence and negotiating power with numerous financial institutions. With their reputation for objectivity, other professional advisors often call upon them for help advising their clients on appropriate products.

Huntington Bank is excited to bring this expertise to its clients.

