Igor A. Zey, MSFS, CFP®, CLU®, ChFC®, CAP®, AEP®, TEP

PFR Advisors
Professional Financial Resources, Inc.

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Mr. Zey is a Managing Partner at PFR Advisors and the President and CEO of Professional Financial Resources (PFR), Inc.

PFR Advisors provides comprehensive Financial Planning for clients going and/or having gone through a divorce and Executive Benefits and Buy-Sell planning for small businesses, law and accounting firms.

More specifically, the scope of the advisory services includes comprehensive fee-based Financial Planning, Estate Tax and Charitable planning, asset protection planning, managing client's financial expectations in divorce, executive benefits, life settlements and premium financing consulting and analysis, life insurance issues and planning in divorce, retirement income accumulation and distribution strategies, and wealth management.

Professional Financial Resources, Inc. provides Expert Witness services, including court testimonies on various financial issues related to imputed interest calculation on assets available for support, retirement plan analysis in divorce, financial planning, and standard of care issues in the investment and insurance communities.

Igor Zey has been a frequent speaker on the subjects of financial, charitable, and estate tax planning in the context of marital dissolutions, ESOPs, executive compensation, disability and life insurance planning, and asset protection planning to various professional groups of attorneys, doctors, Certified Public Accountants (AICPA and California Society of CPAs), and insurance producers (see attached the list of past speaking engagements).

Education:
PhD in Retirement Planning – currently pursuing at The American College of Financial Services, Bryn Mawr, PA
Master of Science in Financial Services (MSFS) - The American College of Financial Services, Bryn Mawr, PA
Bachelor of Arts in Russian Literature and Linguistics - UCLA

Professional Designations and Affiliations:
CFP® (Certified Financial Planner ™)
CLU® (Chartered Life Underwriter)
ChFC® (Chartered Financial Consultant)
CAP® (Chartered Advisor in Philanthropy)
AEP® (Accredited Estate Planner)
TEP (Trust & Estate Planner) – The Society of Trust and Estate Practitioners (STEP), London, United Kingdom

Igor is a member of the Society of Trust and Estate Practitioners (STEP), National Association of Life Underwriters, West Los Angeles Association of Life Underwriters, the Los Angeles Chapter of the National Association of Insurance and Financial Advisors (where he served as director), Beverly Hills Bar Association, Los Angeles County Bar Association (Taxation Chapter), National Association of Estate Planners and Councils, American Institute of Public Accountants and the California Society of Certified Public Accountants.

Mr. Zey currently holds FINRA licenses 6, 7, 63, 65 (grandfathered), and 24.

He enjoys playing chess competitively, Krav Maga, and kickboxing.

Videos & Publications

Resolving Family Owned Business Issues in Divorce
Thursday, March 31, 2016 – Expert Webcast in Santa Monica, CA

The Wealth Channel Provided by The American College
Annuity Straddles and possible policy exit strategies for life insurance owners are discussed by Igor Zey and Allen C. McLellan, Assistant Professor of Insurance and Associate Dean at The American College.

- Understanding Options with Life Settlements
- Negativity Toward Life Settlements
- Non-Traditional Uses of Life Insurance
- The Use of Life Settlements
- When to Consider a Life Settlement
- General Qualifications for Life Settlements

AICPA Wealth Management Insider
October 21, 2010 - Return of Premium Term Insurance: Why it may be a good thing for your clients
August 19, 2010 –Planning for Long-Term Care: Recent Developments in Life Insurance and Annuity Products
July 22, 2010 – Long-Term-Care Insurance: Costs & Benefits -What is covered, what is not
June 17, 2010 - Roth IRA Conversions in 2010: Blessing or curse?
May 20, 2010 - Special Uses of Life Insurance in Pension Plans: Winning strategies revealed
March 18, 2010 - Income and Estate Planning: How strategy planners, charities and donors can use actuarial arbitrage to potentially eliminate risk.
February 18, 2010 – A Solutions-Based Approach to Charitable Planning: a more effective and comprehensive approach to raising revenues in the world of increasingly scarce resources.
January 21, 2010 - Modern Section 79 Plans: tax benefits for business owner retirement using section 79 plans
December 17, 2009 - Life Insurance Premium Financing: Who should consider it and what to look for?
November 19, 2009 - Life Insurance in Retirement Plans: a top-level summary of pros and cons of life insurance in various pension plan scenarios.
October 22, 2009 - Uncovering Hidden Assets in Valuations: Life insurance is an asset class. Should you be the one to put it on your client's balance sheet?

Speaking Engagements & Events

Damages in Wrongful Termination
Presentation Date: Wednesday, March 23, 2016
MCLE Presentation – private law firm, Irvine, CA

Financial and Insurance Valuation Issues for Attorneys
Presentation Date: Monday, February 8, 2016
MCLE Presentation – private law firm, Encino, CA

Financial and Insurance Valuation Issues for Attorneys
Presentation Date: Wednesday, November 11, 2015
MCLE Presentation – private law firm, Santa Monica, CA

Financial Planning and Insurance Valuation Issues in Divorce
August 20, 2010 – CAL CPA – Family Law Section meeting – CPE credit: 0.5 Taxation, 1.0 Family Law, 4.0 CPE credit
Los Angeles – Hilton LAX
Update on standing case and tax cases involving family law matters.

Life Insurance - More Valuable Than You Thought!
Tuesday, April 20, 2010 – 1 CPE credit
National Association of Certified Valuation Analysts

Life Insurance and Divorce Issues
Tuesday, December 8, 2009 – 1 CPE credit
National Business Institute

Life Insurance Latest Update on Products and Uses: What the CPA Needs to Know
Tuesday, October 27, 2009 – 1 CPE credit
National Business Institute

Reducing Risk and Increasing Income in Today's Economy: Non-Traditional Uses of Life Insurance and Annuities
Thursday, November 5, 2009 – 1 CPE credit
National Business Institute

The Art of Life Insurance: Growing, Preserving and Transferring Wealth
Thursday, September 24, 2009 – **8.00 CPE credits** - Including - Administrative Practice - LIVE national webcast

Sophisticated Uses of Premium Financing Vehicles
February 9-10, 2009
Lido Consulting 4th Annual Investment Symposium - Beverly Hills, CA

Life Insurance and Divorce - What CPAs and Attorneys Need to Know
February 4, 2009
State Bar of California - Family Law Study Group Meetings
Beverly Hills, CA

Life Insurance Actuarial Arbitrage -*webcast*
February 03, 2009
California Society of CPAs, Los Angeles, CA

Here Comes the...Divorce? Life Insurance and Financial Planning Issues in Divorce
January 30, 2009
California Society of CPAs, Los Angeles, CA

Life Insurance and Divorce - What CPAs and Attorneys Need to Know
January 13, 2009
State Bar of California - Family Law Study Group Meetings - Sherman Oaks, CA

Life Insurance Issues in Divorce
October 29, 2008 - California CPA Education Foundation - Resort CE Week - San Luis Obispo, CA

Life Insurance World: What the CPA Needs to Know
October 28, 2008 - California CPA Education Foundation - Resort CE Week - San Luis Obispo, CA

Life Insurance World: What the CPA Needs to Know
August 22, 2008 - California CPA Education Foundation - Anaheim, CA

Actuarial Arbitrage in Estate Planning
December 10, 2007 - California CPA Education Foundation - Top 10 Things Financial Planners Need to Know about Estate Planning - Santa Monica, CA

Life Insurance and Actuarial Arbitrage in Older Generations
August 16-17, 2007 - Trusted Advisors Lead Consultant Advisory Group Annual Meeting - New York, NY

Life Insurance and Actuarial Arbitrage in Charitable Planning
May 30, 2007 - June 1, 2007 - Planned Giving Roundtable of Southern California - 2007 Western Regional Planned Giving Conference - Costa Mesa, CA

Life Insurance and Actuarial Arbitrage in Charitable Planning
February 4, 2005 - Equitable Agents Reinsurance Company

Managing Client Relationships and Expectations
January 10, 2005 - January 12, 2005
American Institute of Certified Public Accountants - National Personal Financial Planning Technical Conference
Fajardo, Puerto Rico