MICHAEL F. GRECO, CLU

Michael Greco has more than twenty years of experience in the fields of financial, retirement and estate planning and is a Partner and CEO of Greco Planning Group. His career has progressed steadily through an array of increasingly responsible positions into senior management with a major insurance company prior to the formation of Greco Planning Group. By delivering unparalleled results to his clients, Mr. Greco has earned a reputation as an expert in the area of qualified retirement plans, 412(e)3 plans, individual annuities and estate planning.

Specializing in the intricacies of retirement plan options, the major thrust of Mr. Greco's work is to assist individuals and corporations in maximizing pension fund accrual while minimizing taxation consequences. Through program modeling strategies, best-choice options are demonstrated relative to state, federal, transfer and estate tax issues.

Mr. Greco's credentials include recognition as a Chartered Life Underwriter (CLU) as well as Series 7 & 63 titles, and Life and Health Insurance licenses. As a member of the Association for Advanced Life Underwriting, the Society of Financial Service Professionals, the Financial Planning Association of Long Island (in which he is also a former Board member) and MDRT Top of the Table, Mr. Greco is committed to professional growth and excellence.

A native New Yorker, Mr. Greco received his Bachelor's degree in Business Administration from Hofstra University. He is actively involved in community work as a participant in the Hofstra University Planned Giving program and as a committee chairperson for a local school. His knowledge base regarding tax and IRS issues pertaining to these options is extensive. He is a regularly requested speaker to industry groups such as AALU, FPA, MDRT, as well as numerous insurance companies, financial institutions and professional organizations across the United States.