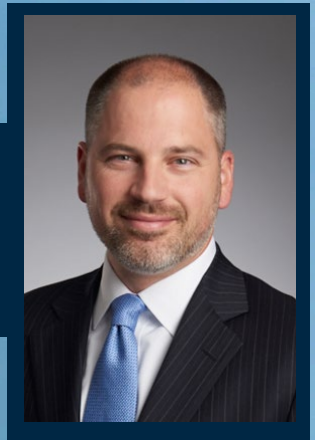


Albert A. Lorenzi III, CEPA

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▼ Biography

As an independent insurance advisor and advanced insurance planning consultant with Underwriters Brokerage Service, Al's emphasis is rooted in insurance plan design and consultation for a broad range of financial professionals, trust companies, tax and legal counsel.

Al specializes in partnering with advisors in a consultative process to assist in the areas of personal, estate, business and charitable planning. He also brings additional expertise to assist with the review and analysis of existing insurance policies.

Al began his career with Northwestern Mutual in 2001, received his Bachelor's degree from Robert Morris University and is a Certified Exit Planning Advisor (CEPA). Al and his wife Colleen and their two sons are residents of Jefferson Hills, PA.

▼ Experience

- Legacy Planning
- Policy Audit and Review
- Long Term Care Planning
- Wealth Transfer Planning
- Business Succession Planning
- Employee Retention Strategies

▼ About Underwriters Brokerage Service

Since 1970, Underwriters Brokerage Service has focused exclusively on serving the needs of financial service professionals. That focus has helped us grow to become the region's leading independent insurance wholesale brokerage firm for Life Insurance, Long Term Care and Annuities.

We partner with a wide range of financial service professionals including Life Insurance Professionals, Financial Advisors and Property Casualty Agents.

Support for competitive case needs includes low cost guaranteed protection, estate and business planning (including assistance at point-of-sale) and niche product opportunities. In addition, our impaired risk expertise enables us to accommodate many of your most difficult impaired risk clients.