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Biography

As the Estate Planning Specialist at Underwriters Brokerage Service, Sean works closely with financial advisors and provides objective estate planning consulting along with reviews of clients' estate plans. He is available as a resource for estate planning situations and has given presentations on various estate planning topics.

After beginning his career as a trial attorney, Sean served as a Fiduciary Advisor for PNC Wealth Management (now PNC Private Bank), where he specialized in trust administration and estate planning for mass-affluent and high-net-worth clients. Sean is a member of the Estate Planning Council of Pittsburgh, and served as Vice President on the Board of Directors for the Pittsburgh Chapter of the Society of Financial Service Professionals.

Experience

- Legacy Planning
- Advanced Case Design
- Client Engagement
- Wealth Transfer Planning
- Trust Administration
- Educational Outreach

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.