

Schechter Wealth: In The News

Press Release

Michael Lee joins Schechter Wealth to Manage Growth

BIRMINGHAM, MICHIGAN/October 13, 2014 – Jason Zimmerman, Senior Managing Director announces the appointment of Michael Lee as Chief Financial Officer. Mr. Lee will be responsible for all accounting, financial management and business planning functions, as well as directing the human resources, office administration and IT departments. Additionally, Mr. Lee will provide leadership in guiding the firm's expansion and growth strategies.

Marc Schechter, Senior Managing Director states, "As we expand our organization and our investment advisory services Mike will develop and oversee additional processes to help us maintain our high quality standards during our planned growth. Mr. Lee brings proven experience in guiding organizations during rapid growth. Mike's experience will be invaluable in helping us attain our firm's goals."

Mr. Lee brings over 30 years of experience in accounting, finance and operational leadership. Prior to joining Schechter, Michael was responsible for accounting, finance and operations administration functions as Vice President Finance at MXM Health. Prior to that, he served nearly twenty years as Director of Finance at Carlson Marketing Group's automotive operations in Troy.

"Having Michael join our team is an important step as we continue to grow beyond our traditional markets with services that complement our advanced life insurance expertise. Michael brings a unique perspective in bridging financial and operational issues, and has already added an important dimension to our leadership team," Added Jason Zimmerman.

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Schechter Wealth is a boutique third generation wealth advisory firm. For over 75 years, our multi-disciplined team consisting of one or more JDs, CPAs, LLMS, CLUs, PFSs, CAPs, MBAs and CFA® charterholders has been quietly advising wealthy families on financial matters including: institutional quality investment advisory services, advanced life insurance planning, income and estate taxes, business succession, and charitable planning.

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