Schechter Wealth: In The News

Press Release

Schechter Wealth expands to Los Angeles; Names Scott Diamond Vice President

BIRMINGHAM, Mich., Jan. 19, 2015/ -- Jason Zimmerman, Senior Managing Director, announces the appointment of Scott Diamond to Vice President, Senior Advisor at Schechter Wealth – an independent investment advisory and advance life insurance design firm.

Mr. Diamond will be responsible for introducing Schechter's unique advanced life insurance strategies to Los Angeles area CPAs, attorneys, and personal advisors of high net worth individuals, families and business owners.

"Scott's expertise in advanced financial solutions is the perfect fit for Schechter Wealth and those in the Los Angeles area looking to preserve, leverage or transfer their wealth. His previous experience is an ideal dovetail since he has a great understanding of the tax issues high wage earners and high net worth families face," said Jason Zimmerman.

Prior to joining Schechter, Mr. Diamond was President of Roxbury Consultants where he designed customized, executive benefits programs to help clients retain, attract, and motivate their talent, and was a nationally recognized benefits and compensation resource. Mr. Diamond's expertise also included sophisticated financial approaches to the individual life insurance market, including both traditional life products and private placement variable life contracts. He was also a Senior Vice President at MullinTBG, where he worked with Fortune 1000 companies.

"We are really excited to bring our unique capabilities into the Los Angeles market. We're fortunate to have found someone with Scott's knowledge, character and relationship base in the professional advisory and high net worth communities to represent our firm," said Marc Schechter, Senior Managing Director.

Mr. Diamond is securities registered in his home state of California in addition to Minnesota. He attended the University of Texas where he received a Bachelor's Degree.

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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.