

# Glen E. Horecky, RFC, CSA

*Registered Financial Consultant, Certified Senior Advisor*



Glen E. Horecky is a *Partner* of **Wealth Design Strategies**, a financial advisory firm having unique expertise in risk management, tax planning, and the design of proprietary financial structures.

Mr. Horecky brings more than 25 years experience in Advanced Estate Planning, Insurance Consulting and Portfolio Management for individuals and businesses of substantial net worth. Mr. Horecky is often brought in as a member of a team of professionals who advise clients on the integration of legal, financial, and tax planning matters. Mr. Horecky's previous professional experience includes:

- ♦ *Executive Vice President* of JCA Financial Services, subsidiary of a regional Investment Banking firm. Mr. Horecky was responsible for the development and operation of the *Planning Services Division*.
- ♦ *Staff Financial Consultant* with a prominent Palm Beach county Law Firm.
- ♦ *Director of Estate Planning* of a branch of a national Stock Brokerage firm.
- ♦ *President of Interlink Services, Ltd.*, a Bahamas based International Financial Advisory firm specializing in Offshore investment management and international tax planning.
- ♦ *Host of a daily Radio Talk Show* broadcast throughout south Florida, and a frequent guest speaker on other radio and television financial programs.

## Education:

- ♦ Canadian Academy, Kobe, Japan
- ♦ University of California, Santa Barbara
  - BA's in Finance and Religious Studies (Cum Laude)
- ♦ Advanced professional designations
- ♦ Currently matriculated in the *Certified Estate Planner* curriculum

A frequent guest lecturer, Mr. Horecky has addressed many accredited seminars and conferences on various financial, tax planning and insurance topics. Mr. Horecky has recently given talks to organizations such as:

- ♦ The American Institute of Certified Public Accountants for *Continuing Professional Education*.
- ♦ The Florida Bar Association for *Continuing Legal Education*.
- ♦ Numerous major brokerage houses and Trust Companies
- ♦ Chambers of Commerce

Mr. Horecky is on the Board of Directors of several local Charities and Planned Giving Committees. He is also a member of various professional associations including:

- ♦ Boca Raton Estate Planning Council
- ♦ Int'l Association for Financial Planners
- ♦ Million Dollar Round Table
- ♦ Nat'l Association of Life Underwriters
- ♦ The Oxford Institute
- ♦ The Offshore Institute

Mr. Horecky is active with the Chamber of Commerce and several civic organizations. He is fluent in Spanish and Japanese, and is a competitive tennis player. He is married with two children and lives and works in Asheville, NC and Boca Raton, FL.