



Fred Recchio, CFP

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Background & Experience

Fred focuses on protection planning, wealth accumulation, supplemental income planning, and wealth transfer strategies specifically for high income and high net worth clients. Working with your Financial Advisor or wealth management team, he develops strategies that are designed in harmony with your overall financial, estate, and business succession goals to help protect and preserve your assets for the next generation. With over 35 years of experience in the insurance industry, Fred's extensive knowledge of advanced life insurance strategies and their applications allow him to work closely with your financial team, including attorneys and accountants, to execute the program best suited to meet your objectives.

Fred knows that each comprehensive plan requires an individualized approach and unique strategies. He brings creative, personalized financial strategies that take advantage of life insurance's ability to function as a premier wealth transfer, wealth accumulation, protection, or estate planning vehicle.