



# Robert W. Chesner, Jr.

## *Curriculum Vitae*

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**Bob Chesner** leads the firm's insurance and investment oversight practice. Drawing on his extensive expertise and experience as a finance and insurance executive, Mr. Chesner assists high net worth individuals and family offices in the design and implementation of domestic and international life insurance and annuity structures, consults on their property, casualty, and liability needs, and oversees the marketing and development of the firm's insurance practice. He also consults with firm clients about the implementation, reporting, and analysis aspects of their investment portfolios as well as all other non-investment risk management matters. Mr. Chesner serves as President of Edgewater Consulting Group, Ltd., a GSRJ affiliate that provides a comprehensive post-sale service platform to insurance professionals in the private placement life and annuity marketplace. However, neither GSRJ nor Edgewater Consulting Group, Ltd. is an insurance broker or registered investment advisor.

Mr. Chesner is also the firm's Chief Operating Officer. In this role, he leads and oversees all of the operational, administrative, and financial functions of the firm.

Mr. Chesner is a frequent speaker on life insurance matters and is quoted regularly in major financial publications. Prior to joining GSRJ in 2007, Mr. Chesner was Vice President of AIG Global High Net Worth Markets, a division of AIG Worldwide Life Insurance, a subsidiary of American International Group, Inc. (AIG). Mr. Chesner directed distribution and marketing activities in the high net worth marketplace for AIG and managed its COLI/BOLI market strategy, implementation, product development, and marketing. Mr. Chesner began his career at KPMG Peat Marwick, working exclusively in the insurance industry, including positions at Universal Underwriters Insurance Company, and New York Life. Mr. Chesner co-authored, with Leslie Giordani, Bloomberg BNA's Tax Management Portfolio 870, 1st, "Private Placement Life Insurance and Annuities."

### Education

Providence College (B.S., Accounting, 1989)

### Professional Affiliations

Association for Advanced Life Underwriting (AALU)

National Association of Insurance and Financial Advisors (NAIFA)

### Professional Publications

*Private Placement Life Insurance and Annuities*, Bloomberg BNA Tax Management Portfolio 870, 1st, September 2013 (co-authored with Leslie Giordani)

*Planning for Uncertainty: Private Placement Life Insurance for Taxing Times*, Offshore Investment, Issue 230 (October 2012)

*New York University Review of Employee Benefits and Executive Compensation-2011*, LexisNexis (article contribution, Ch. 8, “The Cash Value Beneficiary Defective Inheritor’s Trust--Creating a More Flexible and Comprehensive Wealth Accumulation and Retirement Plan--Advanced Planning Issues: Part 2--Current Issues Regarding the Valuation of Life Insurance Policies and Advanced Wealth and Retirement Planning with Private Placement Life Insurance”)

“Why Investment Advisors Need to Know About Private Placement Life Insurance,” *Investments & Wealth Monitor* (January 2011)

“Private Placement Life Insurance: A Cornerstone of Financial and Estate Planning for the High Net Worth Individual,” *The WealthCounsel Quarterly* (April 2010)

“Private Placement Life Insurance: A Diamond in the Rough,” *NAIFA’s Advisor Today* (January 2010)

## Professional Presentations (Selected)

“Beyond the IRA and 401(k): Creating Unlimited Tax-Free Retirement Income,” on the topic of private placement life insurance at the Tony Robbins Platinum Partnership Meeting (Sun Valley, Idaho; February 2018)

“Protecting Wealth and Reducing Taxes: Your Clients Can Have Their Cake and Eat It Too!” Financial Planning Association (Austin, Texas; November 2017)

“Beyond the IRA and 401(k): Creating Unlimited Tax-Free Retirement Income,” on the topic of private placement life insurance at the Tony Robbins Platinum Partnership Meeting (Whistler, B.C., Canada; February 2017)

“Beyond the IRA and 401(k): Creating Unlimited Tax-Free Retirement Income,” on the topic of private placement life insurance at the Tony Robbins Platinum Partnership Meeting (Sun Valley, Idaho; February 2016)

“Private Placement Life Insurance: Generating Tax-Free Retirement Income,” Bloomberg BNA, Tax & Accounting (e-CPE Webinar; June 2015)

“Recent Trends in Private Placement Life Insurance for Affluent Families: Tax Free Investing in a Taxing Environment,” Callan Independent Adviser Group 2013 National Conference (Washington, D.C.; October 2013)

“Reducing Tax on Investment Portfolio Returns: A Top Priority in a Rising Tax Environment,” Marcus Evans Private Wealth Management Summit (Las Vegas, Nevada; December 2010)

“Private Placement Life Insurance,” Society of Financial Service Professionals (Houston, Texas; February 2010)

IIR 7th Annual Event: Alternative Investing Through Life Insurance and Annuities (Miami, Florida; February 2009) (Chairperson)

“Asset Protection Tools and Techniques,” 2008 McGehee Group Annual Advisors Conference (Las Vegas, Nevada; October 2008)

“Private Placement Life Insurance in the Offshore Marketplace,” 11th Annual Advanced ALI-ABA Course of Study for Counselors to Foreign and U.S. Clients (Santa Fe, New Mexico; July 2008)

“Gaining Preferential Tax Benefits On Your Investments Via Private Placement Life Insurance,” 15th Annual Family Office Forum (Chicago, Illinois; June 2008)

“Private Placement Life Insurance and Annuity Industry Update and Progress Report,” and “Q&A with the Carriers: Hear From the Experts,” IIR 6th Annual Event: Alternative Investing Through Life Insurance and Annuities (Miami, Florida; February 2008) (Chairperson, Speaker and Panelist)

“Deploying Alternative Investing Strategies via PPLI,” 14th Annual Family Office Forum (Chicago, Illinois; June 2007)

“Private Placement Life Insurance: Private Placement Variable Annuities,” Cannell Capital LLC Alternative Asset Summit VI (Sun Valley, Idaho; March 2007)

“Private Placement Life Insurance and Annuity Industry Update and Progress Report,” IIR 5th Annual Event: Alternative Investing through Life Insurance and Annuities (Miami, Florida; February 2007) (Co-Chairperson and Panelist)

“Buyer/Seller Forum: Expanding the Distribution Landscape for Selling PPLI Through Education, Marketing, and Sales Strategies,” IIR 4th Annual Event: Hedge fund Investing Through Life Insurance and Annuities (Coconut Grove, Florida; February 2006) (Panelist)

“Trends and Developments in Private Placement Life Insurance: Industry Update and Progress Report,” IBC 3rd Annual National Event: Hedge Fund Investing Through Life Insurance and Annuities (New York, New York; June 2005)

“The Domestic vs Offshore Debate – Who’s Got the Best PPLI?” IBC 2nd Annual National Event: Hedge Fund Investing Through Life Insurance (New York, New York; June 2004)

“Comparing On-Shore and Offshore Private Placement Life Insurance – Assessing the Benefits and Trade-Offs of Each,” IBC Inaugural Event: Hedge Fund Investing Through Life Insurance (New York, New York; April 2003)

## Contact Information

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