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Gregory A. Steen

CEO

Company	Steen & Company
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Phone Number	(559) 227-7322
Industry	Consulting/Management
Specialty	Long-Term Care Consultant

Description

Greg Steen is Certified in Life Resource Planning, a Long-Term Care Consultant, and Founder and CEO of Steen & Company, a full-service estate planning firm headquartered in Fresno, California. Since 1989, he has specialized in the areas of asset protection, preservation and post-retirement planning. He has conducted retirement and estate planning workshops throughout the state and has written and/or co-written various books, pamphlets and articles for industry use. In addition he is the host of the popular Truth4Seniors TV program. In 1983, Greg married his high-school sweetheart and today their family consists of five children and three grandchildren. When away from the office they enjoy camping, skiing and being outdoors with family and friends.

Education

Greg entered the Financial Services Industry in 1987 where he obtained his California Insurance License. Throughout his years as a financial professional Greg has completed various educational courses covering many different aspects of financial planning, including the following courses: Charting Your Financial Future, California Long Term Care, Estate Planning 1 & 2, Employee Benefit Planning, The Power Of Trusts, and Advanced Life & Annuity Planning. Recently Steen earned the Certified Life Resource Planner designation.

Associations

Greg is an approved member of the National Ethics Association (NEA), an independent organization of insurance and financial advisers who have maintained an exemplary record of business ethics. Greg is also a member of the Society for Life Resource Planning, a member-in-good-standing with the National Care Planning Council, and a Founding Member of the Central Valley Care Planning Council, a not-for-profit alliance of individuals and companies dedicated to helping the public deal with elder planning and long term care planning issues.

References

Available upon request.

