

INTRODUCING JEFFREY N. ZISSELMAN, JD,  
WEALTH MANAGEMENT CONSULTANT,  
THE PRIVATE CONSULTING GROUP

*Jeffrey N. Zisselman, JD, is a Wealth Management Consultant with The Private Consulting Group, a full-service wealth optimization firm specializing in planning opportunities for a broad range of affluent clients. Jeff's training in both the legal and financial fields has enabled him to meld these two disciplines in a way which benefits his clients as they strive to protect, maximize and empower their true wealth.*

Through his collaboration with the Wealth Strategies Design Team of The Private Consulting Group, Jeff is able to utilize proprietary techniques and creative solutions to meet his clients' objectives in the areas of income and estate tax savings, family wealth transfer and philanthropic planning. These solutions help Jeff's clients eliminate their dangers, capture their opportunities and reinforce their strengths.

The effectiveness of this planning is maximized through the use of tax-efficient investment strategies and cutting-edge financial products designed to meet the needs of individuals with substantial wealth. In addition to working with members of the Wealth Strategies Design Team, Jeff has worked in concert with numerous attorneys, bank officers, CPAs and other professional advisors throughout the country in order to assemble the best team for each client situation.



Many clients engage our services on a retainer basis, and ask us to coordinate with their existing advisors to review their existing planning, and when appropriate, design and implement sophisticated tax, wealth preservation and investment strategies. Our fees are quoted in advance after a careful study of a prospective client's affairs, and generally are significantly less than the income tax savings we generate in the year of our engagement.

#### QUALIFICATIONS AND PROFESSIONAL AFFILIATIONS.

Wealth Management Consultant of The Private Consulting Group, with offices located in Portland, Oregon; Boston, Massachusetts; Arlington, Virginia; Memphis, Tennessee; Salt Lake City, Utah; Seattle, Washington; Los Angeles, California; and Albany, New York. Registered Representative and Registered Investment Advisory Associate with The Private Consulting Group, an NASD registered Broker-Dealer.

#### EDUCATION AND EXPERIENCE.

Jeff is a graduate of Boston University School of Business and Boston University School of Law. Subsequent to graduating law school, Mr. Zisselman was a Bankruptcy/Corporate Associate at Fischbein/Badillo/Wagner/Harding. Jeff then started Northeastern Mortgage Investment Corp., a licensed mortgage banking institution and was a managing director and CFO. He subsequently founded Capital Quest LLC, a sub-prime mortgage lender licensed in eleven states. In 1998 he was a finalist for Ernst & Young's Entrepreneur of the Year Award.

Jeff was the founder and Chief Operating Officer of a registered Broker-Dealer and financial strategy firm located in New York City. The client base consisted of mainly high net worth individuals. The firm also advised on financial planning strategies. Jeff also founded Ehumpy.com LLC, an incubation company and investor for startup technology companies.

PHILANTHROPY.

Jeff sits on the Board of Directors of The Novateur Group LLC, a environmental technology investment firm.

Junior member and Gold Circle contributor to the American Ballet Theater. Volunteer for the Starlight Make-A-Wish Foundation.

PERSONAL.

Jeff resides on the Upper West Side of Manhattan. He is an experienced cyclist, triathlete and marathoner.