

PARTNERING WITH YOUR FAMILY AND ADVISORS TO DELIVER ALPHA

Our clients often have complex financial objectives and business needs.

Having worked with affluent families for more than four decades, the JR KATZ process is rooted in a collaborative approach with the client and their team of advisors. Our sole focus is what is in the best interest of our clients. We do not represent insurance companies; we do not focus on product; and we do not pretend to be something that we are not.

The firm was built to achieve the best results for our clients during implementation and beyond.

Finding ways to lower structural costs, increase client flexibility, negotiate lower premiums, and mitigate taxes are core to our DNA. Our transparent process is a collaborative effort designed to ensure that the client achieves their objectives.

JR KATZ serves as an advisor in areas of wealth transfer, wealth preservation, succession planning, and risk management.

We deliver value and “edge” through our expertise, client advocacy, and influence within the marketplace.

45+
Years Client commitment and thought leadership have distinguished JR KATZ since 1976.

\$5+
Billion JR KATZ manages more than \$5B in life insurance portfolios.

Due Diligence
SOLVING SPECIFIC CONCERNS

Unlike most firms, we do not push product on behalf of insurance companies. At JR KATZ we solve problems, and we work solely for the client. We focus only on developing solutions to specific client concerns and helping clients fulfill their defined objectives.

Solution Design
GOALS BASED EFFICIENCY

Our case design team builds a policy in the best interest of the client with a laser focus on the specific goal. This seems like it should be common but unfortunately it is not. At JR KATZ, we explain the pros and cons of different approaches and different potential design decisions. Conflating concepts and causing confusing is antithetical to our core mission.

Underwriting Expertise
REDUCING CAPITAL OUTLAY

Plenty of firms brag about what they can get done. JR KATZ walks the walk. Our access and influence within the top insurance carrier marketplace has proven to be a differentiator that saves significant client capital.

Client Service
STAYING ON TRACK

Most firms adopt a sell it and forget it attitude. Quite often “reviews” are just seen as an opportunity to encourage the client to purchase something else. At JR KATZ, monitoring policy performance and understanding changing client objectives is critical. Regular reviews are essential, and clients should not accept anything less.