



INSURANCE CONSULTING FOR RIAs

## PROFESSIONAL BIO

ALBERT A. LORENZI III, CEPA

PRINCIPAL



As Principal and Co-Founder of The LRM Group, Al Lorenzi focuses exclusively on providing objective insurance consulting support to fee-based and fee-only advisors and advisory firms. As an independent insurance advisor and advanced insurance planning consultant, Al's emphasis is rooted in insurance plan design and consultation for a broad range of financial professionals, trust companies, tax and legal counsel.

Al specializes in partnering with advisors in a consultative process to assist in the areas of personal, estate, business and charitable planning. He also brings additional expertise to assist with the review and analysis of existing insurance policies. Al began his career with Northwestern Mutual in 2001, received his Bachelor's degree from Robert Morris University and is a Certified Exit Planning Advisor (CEPA). Al and his wife Colleen and their two sons are residents of Jefferson Hills, PA.

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