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Dr. Zey is the managing partner of PFR Advisors, LLC

PFR Advisors, LLC provides comprehensive Financial, Income, and Estate Tax Planning for wealthy families and Executive Benefits and Buy-Sell planning for businesses, individuals, and professionals.

The scope of the advisory services includes comprehensive fee-based Financial Planning, Estate Tax and Charitable planning, asset protection planning, managing clients' financial expectations, executive benefits, life settlements and premium financing consulting and analysis, life insurance issues and planning in divorce, retirement income accumulation and distribution strategies, and wealth management.

Professional Financial Resources, Inc. provides Expert Witness services, including court testimonies on various financial issues related to imputed interest calculation on assets available for support, retirement plan analysis, financial and insurance planning in divorce, and standard of care issues in the investment and insurance communities.

Igor Zey has been a frequent speaker on the subjects of international tax planning, financial, charitable, and estate tax planning, ESOPs, executive compensation, disability and life insurance planning, and asset protection planning to various professional groups of attorneys, doctors, Certified Public Accountants (AICPA and California Society of CPAs), and insurance producers. Many of his courses have been approved for MCLE and CPE credits. He is an adjunct professor of Business Ethics for the California Lutheran University MBA Program.

Education:

PhD in Behavioral Finance and Public Policy. Antioch U

Master of Science in Financial Services (MSFS) - The American College of Financial Services, Bryn Mawr, PA

Bachelor of Arts in Russian Literature and Linguistics - UCLA

Professional Designations and Affiliations:

CFP® (Certified Financial Planner™)

CLU® (Chartered Life Underwriter)

ChFC® (Chartered Financial Consultant)

CAP® (Chartered Advisor in Philanthropy)

AEP® (Accredited Estate Planner)

TEP (Trust & Estate Planner) – The Society of Trust and Estate Practitioners (STEP), London, United Kingdom

Igor is a member of the Society of Trust and Estate Practitioners (STEP), National Association of Life Underwriters, FINSECA (AALU and GAMA), the Los Angeles Chapter of the National Association of Insurance and Financial Advisors (where he served as director), Beverly Hills Bar Association, Los Angeles County Bar Association (Taxation Chapter), National Association of Estate Planners and Councils, and the California Society of Certified Public Accountants.

Mr. Zey holds FINRA licenses 6, 7, 63, 65, and 24.

He enjoys playing chess competitively, Krav Maga, and philosophy.