About Bill Schretter, MBA, CLU®, ChFC®, CFP®, ATA®

Bill is an experienced Wealth Advisor and CERTIFIED FINANCIAL PLANNER™ dedicated to helping clients achieve their life, financial, and legacy goals through the efficient and effective use of financial tools, tax strategies, and properly documented estate plans. Further, he understands that there is more to your goals and legacy than just money.

Bill is the founder and Senior Legacy Consultant of Life-Legacy Services, a concierge fee for service organization that help clients Plan Their Future, Live Their Life, and Craft Their Legacy.

Since 1998, he has worked for a variety of firms in the financial services industry. He has been a Trader for Fidelity Investments, a Tax Consultant for AIG Pinnacle Taxx Advisors, a Supervisor for Northwestern Mutual, and a Compliance Manager for Capital Analysts Incorporated. Recently, he was the Senior Financial Planner for Key Private Bank in Southwest Ohio serving high net worth individuals, professionals, families, and business owners by providing comprehensive tax, estate, financial, and business succession planning.

He currently serves as a CFP Board Ambassador™, member of the planning committee for the annual WSU LIFT^2 Symposium. and as the Regional Ethics Presenter for the FPA of Southwestern Ohio. Further, he has been a Board Member of the FPA of Southwestern Ohio, a Director of the Dayton Society of Financial Service Professionals, and was the AARP Regional Financial Education Instructor in Southwestern Ohio providing seminars to its members.

Through these roles, he has worked with people of all levels of wealth and background; so, he understands the intricacies of true wealth management, especially the value of sharing your values (messages of love, appreciation, and advice) to inspire those you love and leave behind at death. He has developed and presented financial education seminars for students, public audiences, and for private industry. He has been quoted in the Dayton Daily News, CNBC, Bloomberg, and has published articles on the CFP Board website.

He has a B.S. in Business from Miami University and an MBA from the University of Cincinnati. As a licensed insurance agent, he assists with decisions regarding life, health, disability, and long-term care insurance.

He lives in Lebanon, Ohio, with his wife, Beckie (Miami Merger), and together they have two children. His hobbies include gardening and golf. Further, he volunteers and assists with Boy Scout and Girl Scout activities in the area, volunteers and is a Board Member of Junior Achievement OKI, and is a Board Member of the Girl Scouts of Western Ohio. He has also been the Chairman of the Board for the Lebanon Space Camp Committee, a 501c3 and a member of the Board for the Crusaders4Educational Enrichment, 501c3. He cares about encouraging S.T.E.M. education, fostering entrepreneurship, and facilitating philanthropy.

"As a fiduciary, I provide life, financial, and legacy planning services to help you identify, afford, and achieve your goals…I understand the value of financial planning and of having a plan that is based on your values."