PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Stefan Cherneski, CFP

Region Focus: Northeast

Background & Experience

Stefan Cherneski serves as an Insurance Planning Consultant for PLAN. With specialized experience in the small business market, his focus is to assist financial advisors in growing their practices with high-net worth clients and business owners. For his clients, he serves as a resource for customized insurance solutions related to personal, business and estate tax planning strategies.

With a background as a Tax Economist, Stefan understands the needs of business owners, particularly in a challenging and ever-changing tax law environment. He brings multiple carrier access, objective needs planning and creative tax strategies to each unique client situation. Stefan has been a frequent lecturer across the Country on the advantages of Employee Benefit Plans to both Employer and Advisor groups alike. He understands the complexities involved working with Broker Dealers and provides his Advisors additional value by becoming the Insurance component of their team.

Stefan was born and raised in Canada. He moved to the United States after being drafted by the New York Rangers in the 1st Round of the 1997 NHL Entry Draft. After his career was cut short by a knee injury, Stefan attended college at Central Connecticut State University where he graduated at the top of his class with a degree in Economics.

Certifications & Education

- Central Connecticut State University, New Britain, CT
- Series 6, 7, 63 & 65