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SERVICES

Wealth Planning & Individual
Services

Corporate Formation, Governance
& Advice

Corporate Transactions

Kathleen W. Bilderback

COUNSEL IN CLAYTON, MO

Kathleen joined Sandberg Phoenix in 2024 as Counsel in the Business practice group. She specializes in estate, business and executive benefits planning, and estate and executive compensation planning with life insurance.

Formerly, she was a member of the Advanced Markets Group of MetLife, where she provided training and advanced underwriting support for the top producers of MetLife and its subsidiaries. Prior to joining GenAmerica Financial (a MetLife company) in 1996, she was in private practice.

Kathleen is a nationally recognized speaker and author.

She currently serves as National President of the Society of Financial Service Professionals and serves on the Board of Directors of St. Louis Children's Hospital Legacy Advisors. She is a member of The Business Insurance & Estate Planning Committee of the Association of Advanced Life Underwriting (AALU)

Kathleen is a former adjunct professor in the LLM program at Washington University's School of Law. She was formerly on the Board of Directors of the St. Louis Chapter of the National Association of Insurance and Financial Advisors (NAIFA) and was selected as a Registered Player Financial Advisor for the National Football League Players Association.

She has presented at AALU and the Top of the Table Meeting for the Million Dollar Roundtable, and she is an annual presenter at the Vistage Executive Summit.

PROFESSIONAL AFFILIATIONS

Accredited Estate Planner designation from the National Association of Estate Planners & Councils.

EDUCATION

J.D., Washington University School of Law in St. Louis

LL.M. in Taxation, Washington University School of Law in St. Louis

B.A. in Accounting and Theatre, Saint Louis University

LICENSURE(S) AND ADMISSION(S)

Missouri

Illinois

Pennsylvania

CIVIC ACTIVITIES

RECOGNITION

2012-2021

SUPER LAWYERS

Missouri Super Lawyer

Missouri Super Lawyer, Estate Planning