

## Rodney C. Zeeb, JD, HDP™



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Rodney (Rod) C. Zeeb, JD, HDP™, is Founder & CEO of both The Heritage Institute® and Genacy™ and co-developer of The Heritage Process®. The Heritage Institute provides training for trusted professionals in addition to Heritage Design Professional® (HDP™) certification. Genacy works with families multi-generationally either directly or in collaboration with their trusted professionals. The Heritage Institute also conducts and distributes original research, offers mentoring, coaching, and marketing support for professional advisors, and provides consulting services directly to individuals and families. Rod has over three decades of experience in estate planning, charitable planning, and heritage design and is recognized internationally for his contributions to the field.

Among the major national conferences and events Rod has spoken to are Pershing's INSITE Conference, MDRT, NAIFA, Kingdom Advisors, Securities Industries and Financial Markets Associations (SIFMA), NAPFA, United Way of America National de Tocqueville Conference, FPA (national and regional groups), International Association of Advisors in Philanthropy, National Association of Charitable Gift Planners, and many others and he typically receives the highest speaker evaluations. Rod has been quoted in *The Wall Street Journal*, *The Christian Science Monitor*, *Dow Jones News*, *Macleans Magazine* (including international editions), *Wealth Collection Magazine*, *Financial Advisor Magazine*, *Wealth Manager Magazine*, *Inside Information*, and many other print and online publications.

Rod is the host of the 'Trusted Advisor' podcast, speaks on issues related to multi-generational planning, is the author of *Beating the Midas Curse* (now in its 3<sup>rd</sup> Edition) and *Family Stewardship*, and co-author of the novel *What Matters*, and has been quoted in both US and international publications. Rod graduated Summa Cum Laude from Willamette College of Law in 1986, where he was Editor-in-Chief of the Willamette Law Review.