



## **John Brady**

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John Brady is a specialist in the design and implementation of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques. John has 26 years financial services experience with specialization in estate, wealth, charitable and business succession planning for ultra-high net worth families and business owners with estates ranging from \$5 million to \$2 billion. He has served as an Estate Planning Specialist with Merrill Lynch and as a Vice President responsible for assisting Merrill Lynch Financial Advisors with estate planning strategies for their clients, in conjunction with the Merrill Lynch Estate & Trust Specialist. John was the President at Essential Strategic Partners, LTD and has assisted CPA's and Attorneys with developing advanced estate plans for their high net worth and business owner clients.

John currently has FINRA Series 7, 6, 63 and 65 licenses.

### **EDUCATION**

- Long Island University, C.W.  
Bachelor of Science