



Bruce Popper CFP®, ChFC®, AEP®

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Background & Experience

With more than three decades of high-end financial planning experience, Mr. Popper has worked with some of the nation's top estate attorneys in the refinement of planning concepts that utilize newly created entity structures, securities, specialized trusts, captives, insurance, and annuities from domestic and international sources. With the ability to cover the simple to the complex and to explain the complex simply, Mr. Popper has been recognized for his ability to add a creative "edge" to traditional planning techniques and to innovative applications, such as Zero-Tax and Life Arbitrage strategies. His planning concentration has been in the New England states, Texas, Florida, New York, California, Utah, and Idaho. Mr. Popper has appeared on television in regional markets as an estate planning specialist and has written articles that have been circulated nationally. He has also been retained as an expert witness in cases regarding the appropriateness of certain Life Insurance sales transactions.

Certifications & Education

- Certified Financial Planner, CFP®
- Accredited Estate Planner, AEP®
- Chartered Financial Consultant, ChFC®
- Auburn University – Auburn, AL
Bachelor of Science, Business Administration