PROFESSIONAL LIFE ADVISORS NETWORK


**Bruce Rothbard, CLU®, ChFC®**

1445 Ross Avenue
Suite 4600
Dallas, Texas 75202
Email: brothbard@emercury.com
Phone: 973-216-3713
Fax: 214-210-5998


**Background & Experience**

Bruce Rothbard provides sophisticated, client-tailored, tax-efficient estate, asset protection, business succession and charitable planning strategies to the high-net-worth clientele of many highly regarded financial institutions in the United States.

With over two decades of high-end financial planning experience, Mr. Rothbard has worked in tandem with some of the nation's top estate attorneys in the development of planning concepts that utilize newly created entity structures, securities, specialized trusts, insurance, and annuities. He can handle the simple to the complex and explain the complex simply. Mr. Rothbard has been recognized for his ability to add a creative "edge" to traditional planning techniques and to innovative applications, such as ZeroTax and Life Arbitrage strategies. Bruce is a frequent keynote speaker at various firm meetings and has written articles on high-net-worth insurance planning that have been circulated nationally.

Previously, Bruce worked as National Sales Director for Southern & Western focused on Morgan Stanley Smith Barney FAs. Before that, he was with Wachovia/Prudential Securities as a Senior Estate Planning Consultant and as an Estate & Insurance Planner with Sagemark Consulting/Lincoln Financial Group where he received National Quality Award for 12 consecutive years. Bruce has a FINRA Series 7, 24, 63 and 65.

**Certifications & Education**

- University of Delaware, Newark, DE - BA, Political Science