PROFESSIONAL LIFE ADVISORS NETWORK

Doug Lem
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Doug Lem has more than 30 years of experience as a specialist in the design and implementation of advanced wealth transfer strategies for families of significant wealth, entrepreneurs and professionals working with advisors to establish fund, and leverage business succession and estate planning strategies.

Doug specializes in point-of-sale assistance, focusing on business and estate planning for high net worth families, business owners, and professionals. Doug previously owned an independent life insurance agency for 25 years.

Prior to joining Mercury Financial Group, Doug was the Director of National Accounts for Pacific Southwest Financial. In 2001, Doug participated in the UBS pilot program, serving as an in-house general agent working with high net worth clients in estate and insurance planning.

Doug is a Certified Estate Planner (CEP), from the National Institute of Certified Estate Planners and has a FINRA Series 7 and Series 66.

EDUCATION

- University of California at Berkley, Berkley, CA