PLAN

PROFESSIONAL LIFE ADVISORS NETWORK

Bruce Popper

FP®, ChFC®

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Bruce Popper provides sophisticated, client-tailored, tax-efficient estate, asset protection, business succession, and charitable planning strategies to high net worth clientele of many highly regarded financial institutions in the United States. His responsibilities include face-to-face meetings with advisors and their clients to assess planning needs and objectives, analyze supplied data and develop strategies for plan implementation through client-selected practitioners.

With more than three decades of high-end financial planning experience, Bruce 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, Bruce 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. He 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 insurance transactions.

Bruce's previously worked at Wachovia Securities/Prudential Securities as a Senior estate Planning Consultant and Vice President. He was also a Founding partner and Estate Planning Specialist with Capital Advisors.

Bruce holds a CFP and ChFC designation. He also has FINRA Series 7, 63 and 65.