EXPERIENCE.

EXPERTISE.

SOLUTIONS.

BRUCE POPPER

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SENIOR ESTATE

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MERCURY FINANCIAL GROUP

EXPERIENCE. EXPERTISE. SOLUTIONS.

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 clients and their advisors to assess planning needs and objectives, analyze supplied data and develop strategies for plan implementation through client-selected practitioners.

PROFESSIONAL HIGHLIGHTS

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.

PREVIOUS EXPERIENCE

Senior Estate Planning Consultant and Vice President
Wachovia Securities / Prudential Securities
Responsible for developing estate planning solutions for high net worth clients of Wachovia Securities Financial Advisors nationwide.

Founding Partner and Estate Planning Specialist – Capital Advisors
Co-founder of national estate and asset protection planning firm. With attorney/CPA partners, provided sophisticated planning strategies and recommendations to high net worth clients of select financial institutions nationwide.

DESIGNATIONS | LICENSES

Certified Financial Planner (CFP) – CFP Board of Standards
Chartered Financial Consultant (ChFC) – The American College
FINRA Series 7, 63, 65 licenses – Registered Representative of The Leaders Group, Inc.
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