EXPERIENCE.

EXPERTISE.

SOLUTIONS.

BRUCE ROTHBARD

CLU® | ChFC®

PLANNING SPECIALIST

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MERCURY FINANCIAL GROUP

EXPERIENCE. EXPERTISE. SOLUTIONS.

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. His responsibilities include face-to-face meetings with clients and their financial advisors to assess planning needs and objectives, analyze supplied data and develop strategies for plan implementation through client-selected practitioners.

PROFESSIONAL HIGHLIGHTS

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. With the ability to cover 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 Zero-Tax and Life Arbitrage strategies.

Mr. Rothbard is a frequent keynote speaker at various firm meetings and has written articles on high net worth insurance planning that have been circulated nationally.

PREVIOUS EXPERIENCE

National Sales Director, Southern & Western Division; Eastern Divisional Sales Director Morgan Stanley Smith Barney Insurance Group.
Nationally top-ranked specialist responsible for providing comprehensive estate and insurance planning solutions for high net worth clients of Wells Fargo Advisors.

Senior Estate Planning Consultant – Wachovia Securities / Prudential Securities.
Nationally top-ranked specialist responsible for providing comprehensive estate and insurance planning solutions for high net worth clients of Wachovia Financial Advisors

Estate and Insurance Planner – Sagemark Consulting/Lincoln Financial Group
Provided sophisticated fee-based planning instruments, strategies and recommendations to high net worth clients. Received National Quality Award for 12 consecutive years

EDUCATION | DESIGNATIONS | LICENSES

Bachelor of Arts, Political Science – University of Delaware

Chartered Life Underwriter (CLU) – The American College

Chartered Financial Consultant (ChFC) – The American College

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