EXPERIENCE.

EXPERTISE.

SOLUTIONS.

DOUGLAS LEM, CEP ®

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MERCURY FINANCIAL GROUP

EXPERIENCE. EXPERTISE. SOLUTIONS.

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.

PROFESSIONAL HIGHLIGHTS

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.

PREVIOUS EXPERIENCE

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.

EDUCATION | DESIGNATIONS | CERTIFICATIONS

University of California at Berkeley – BA

Certified Estate Planner (CEP) – National Institute of Certified Estate Planners

FINRA Series 7, 66 licenses. Registered Representative of The Leaders Group Inc. Member FINRA

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