



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

Planning Specialist, Mercury Financial Group

Responsible for meeting with and developing estate planning solutions for the high net worth clients of financial advisors in select financial institutions. In 2019, Mercury Financial was acquired by Lion Street, and Bruce became a Senior Vice President for Lion Street Private Client Group.

Senior Estate Planning Consultant and Vice President – Wachovia Securities / Prudential Securities

Responsible for meeting with and developing estate planning solutions for the high net worth clients of these firms nationwide.

Founding Partner and Estate Planning Specialist – Capital Advisors

Co-founder of national estate and asset protection planning firm. With attorney/CPA partners, he was responsible for providing sophisticated planning strategies and recommendations to high net worth clients of select financial institutions nationwide.

DESIGNATIONS | LICENSES

Bachelor of Science/Business Administration – COSC/Auburn University

Certified Financial Planner (CFP) – CFP Board of Standards

Chartered Financial Consultant (ChFC) – The American College

Accredited Estate Planner (AEP) – National Association of Estate Planners and Councils (NAEPC)

FINRA Series 7, 63, 65 Licenses. Registered Representative of Lion Street Financial, LLC.

Securities offered through Lion Street Financial, LLC., Member FINRA & SIPC. Investment Advisory Services offered through Lion Street Advisors, LLC., a Registered Investment Advisor.



Bruce Popper CFP[®], ChFC[®], AEP[®]

SENIOR VICE PRESIDENT

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Lion Street Private Client Group is comprised of an elite national network of planning specialists in the major U.S. wealth markets. We partner with financial advisors and professionals to provide sophisticated planning solutions, business and estate planning strategies, charitable planning, and specialized expertise focused on helping high-net-worth and business clients succeed.

Neither Lion Street, Inc., nor any of its affiliates provide legal or tax advice. For complete details, consult with your tax advisor and attorney.