**JOHN G. BRADY**

PRIVATE WEALTH, LIFE INSURANCE AND ESTATE PLANNING CONSULTANT

John Brady is a specialist in the design and implementation of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques.

**PREVIOUS EXPERIENCE**

30+ years financial services experience with specialization in estate, wealth, charitable and business succession planning for ultra high net worth families and business owners with estates ranging from $5 million to $2 billion.

Estate Planning Specialist – Merrill Lynch Vice President responsible for assisting Merrill Lynch Financial Advisors with estate planning strategies for their clients, in conjunction with the Merrill Lynch Estate & Trust Specialist. Essential Strategic Partners, Ltd – President Assisted CPA’s and Attorneys with developing advanced estate plans for their high net worth and business owner clients.

**EDUCATION**

Bachelor of Science – Long Island University, C.W. Post FINRA Series 7, 6, 63, and 65 licenses