



## **Bruce L. Birnbaum, J.D., LL.M., CLTC** *Financial Adviser*

**Bruce L. Birnbaum, J.D., LL.M., CLTC**, the founder of BIRNBAUM ADVISORY, has extensive experience in the areas of insurance, taxation, business, estate and financial planning. He is also a Certified Long-Term Care Professional.

Bruce received his Master of Laws Degree (LLM) in Taxation from New York University School of Law and earned his Law Degree (JD) from Benjamin N. Cardozo School of Law. Bruce, who no longer actively practices law, is a Member of The New York State Bar and the Bar Association of the City of New York.

Bruce's Multidisciplinary Wealth Strategies approach is derived from his multidimensional background in the law and financial arenas which uniquely qualifies him to more effectively integrate the various components of your planning. Bruce's insight and advice can help enhance your ability to create, accumulate and preserve wealth for yourself and the people you care most about. By representing many different investment and insurance companies, Birnbaum Advisory offers a wide array of options and solutions to better assist you in fulfilling your goals.

### **Publications:**

Bruce's articles have appeared in Taxation for Lawyers, The CPA Journal, The New York Law Journal, Taxation for Accountants, Guardianship and Elder Law in New York (West Publishing) as well as other publications.

### **Lectures and Reference:**

Bruce has lectured for The International Association for Financial Planning, The Society of Financial Service Professionals, The National Association of Insurance and Financial Advisors, The New York State Bar Association, the Nassau, Queens, Suffolk, Westchester and Bronx County Bar Associations, The New York State Society of Certified Public Accountants, The National Conference of CPA Practitioners, Baruch College Zicklin School of Business, The Estate Planning Council of Nassau County, Inc, The Hudson Valley Estate Planning Council, C. W. Post Tax Institute, New York Institute of Technology, St. John's University School of Law, among many other professional, charitable and community organizations. Bruce has been quoted in professional journals and other media.

### **Memberships:**

Bruce has served on the Executive Board of the New York State Bar Association, Elder Law Section and Chaired its Insurance Committee. His current and past memberships include:

- The National and New York State Associations of Insurance and Financial Advisors
- Financial Services Institute
- The Society of Financial Service Professionals
- The New York State Bar Association
- The New York City Bar Association
- The Nassau County Bar Association
- The National Academy of Elder Law Attorneys
- The National Conference of CPA Practitioners
- The Estate Planning Council of Nassau County, Inc.
- Various Community and Charitable Groups

***Bruce has dedicated himself to understanding the complexities involved in the various aspects of planning and applying that knowledge for the benefit of his clients.***