Brad A. Herman, CFP®, ChFC®

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Brad Herman, CFP®, ChFC®, serves as Sales Vice President for Highland Capital Brokerage–Northwest. He has many years of experience in the financial services industry and focuses on wealth transfer planning, estate planning, business succession planning, tax planning, retirement distribution planning, asset protection, and risk mitigation strategies.

Prior to joining Highland, Brad served as Vice President, Wealth Strategist, at Union Bank in The Private Bank division and oversaw all wealth planning operations in the Pacific Northwest. In this role, he developed, designed, and implemented comprehensive wealth plans for high-net worth and ultra-high-net worth clients in California, Washington, and Oregon. He focused in the areas of closely held business succession, advanced estate and tax planning, investment management, and risk management planning, among others.

Prior, Brad worked in the Advanced Planning department of a boutique wealth management firm that specialized in planning for high and ultra-high net worth individuals, families, and business owners. Brad began his career in the financial planning division of one of the largest, U.S.-based, insurance companies. In this position he provided comprehensive planning to the Pacific Southwest region.

Brad brings a unique set of skills and a consultative approach to the clients and advisors with whom he works. He believes that through a deep understanding of each client's situation and through comprehensive goal development, he can provide customized strategies to clients, allowing them to achieve their dreams. Brad finds this to be the most rewarding aspect of wealth planning.

Brad received a Bachelor of Science from San Diego State University, with an emphasis in Finance. There, he completed the Executive Financial Planner Advanced Certificate program for personal planning. In addition, he holds a CERTIFIED FINANCIAL PLANNER™ Professional (CFP®) designation from the Certified Financial Planner Board of Standards, and a Chartered Financial Consultant® (ChFC®) designation from The American College.

In his free time, Brad enjoys traveling, working out, snowboarding, and experiencing wines of the world.

ABOUT HIGHLAND CAPITAL BROKERAGE

Highland Capital Brokerage is committed to partnering with financial advisors and insurance professionals using our core competencies of life insurance, annuities, and long-term care. We distinguish ourselves by providing point-of-sale support, advanced marketing, and creative estate and business planning techniques. We provide these services in an efficient, client-focused environment that extends to carrier and product expertise, underwriting negotiation, and complete back office processing. For more information, visit www.highlandbrokerage.com.

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