

BIOGRAPHY

MERCER H&B EXECUTIVE BENEFITS, A SERVICE OF MERCER HEALTH & BENEFITS ADMINISTRATION LLC

CURRENT RESPONSIBILITIES

Brad Sylvester is a principal in Mercer's Hartford, Connecticut office. In this role, Brad works with high net worth and ultra-high net worth individuals, family offices and their advisors on the design and implementation of estate planning life insurance programs.

Brad's expertise lies in analyzing intergenerational wealth transfer plans to identify opportunities for the implementation of life insurance to increase efficiency and optimize wealth preservation. Life insurance is presented as a noncorrelated asset allocation to de-risk the overall investment strategy.

In addition, Brad and his team at Mercer Private Client structure and assist with the design and implementation of Key Person life and disability income programs for private equity firms investing in PORTCOs and companies seeking protection for their key executives.

EXPERIENCE

Brad has more than 40 years experience in the vertical. He has been with Mercer Private Client for 12 years, having previously worked with an alternative asset management firm on the placement of proprietary private placement life insurance policies with 3(c)7 qualified purchasers.

DESIGNATIONS

- Bachelor's degree, theology, Berkshire Christian College, Haverhill, Massachusetts
 - Master's degree, psychology, Springfield College, Springfield, Massachusetts
 - Series 6, 63, 22, 7 and 24 registrations
 - Chartered Life Underwriter (CLU), The American College, Bryn Mawr, Pennsylvania
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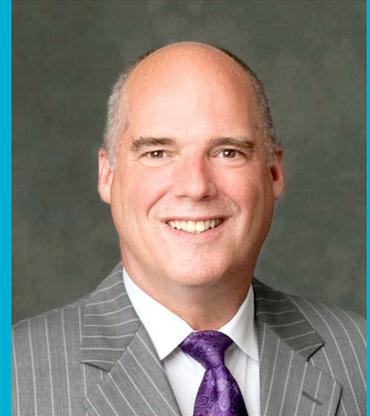
¹Registered representative

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