

ROBERT E. BURTON LLB CLU ChFC AEP

Burton Insurance Services

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Innovative Programs with Life Insurance and Other Products for

- **Estate and Business Planning**
- **Planned Philanthropy**
- **Executive Benefit Plans**
- **Life Settlements / Premium Financing**
- **Life Insurance, Long-Term Care & Disability Insurance, Annuities**

Education:

Bachelor of Science in Economics from Yale University; Bachelor of Laws from Columbia University Law School.

Business History:

Bob practiced law in New York City for nine years, specializing in estate, trust, and corporate work. He joined New York Life in 1964 and transferred to San Francisco in 1966. As Senior Advanced Planning Consultant for New York Life, he was a leader in all phases of the Company's Advanced Planning program and authored numerous Advanced Planning Bulletins. He retired early from New York Life and, from 1986 through 1989, was Vice President of Management Compensation Group/SF, specializing in the design and funding of supplemental executive benefit programs for major corporations. He re-affiliated with New York Life in 1990 and later became a principal of The Silver Group, which joined Provada Insurance Services in 2006 where he was Director of Advanced Planning until 2012, when Provada was taken over by another firm that changed the direction of its operations. He is now an independent agent under the name, Burton Insurance Services.

Speaking Engagements and Published Articles:

Faculty member at CLU Symposium and nine CLU Institutes; repeat speaker at meetings of both the Association for Advanced Life Underwriting and the Million Dollar Round Table; speaker at Nevada Estate Planning Conferences and Federal Tax Institute; faculty member at seminars sponsored by the Community Property Journal, Farnsworth Publishing Company, and California CPA Foundation for Education and Research; lectured on Deferred Compensation at the Twelfth Annual Federal Estate Planning Symposium in Kansas City, co-sponsored by UMKC Law School; faculty member at the Practising Law Institute's 37th Annual Estate Planning Institute in San Francisco; frequent speaker at meetings of Estate Planning and Planned Giving Councils, Chapters of the Society of Financial Service Professionals and the National Association of Insurance and Financial Advisors, and other industry groups, mainly on Estate Planning, Planned Philanthropy, Deferred Compensation, and Life and Long-Term Care Insurance.

Article on using Philanthropy in Estate Planning was published in July 1996 issue of the *Daily Journal*; article in July 1997 issue of *Trusts & Estates* magazine, written with input from Alan Silver, won their EPIC Award as "Best Article" of the year; article on Life Settlements was published in August 2004 issue of *California Broker*.

Professional Affiliations:

San Francisco Estate Planning Council (Former President)

East Bay Estate Planning Council (Former Director; Past Chairperson, Technical Update Committee)

Marin County Estate Planning Council

National Association of Estate Planners & Councils (Speakers' Bureau, Recent two-term Board Member)

State Bars of New York and California (Inactive Status)

Association for Advanced Life Underwriting

Golden Gate Chapter, Society of Financial Service Professionals (Former President)

Local, State, and National Associations of Insurance and Financial Advisors (NAIFA)

Community Activities:

Former Member and Chairperson, Mill Valley Planning Commission

Former City Councilmember and two-term Mayor of Mill Valley

Former Member, Marin County Transit District and Marin County Transit Commission (former Chairperson)

Former Member, Community Vitality Committee & Arts Subcommittee, Mill Valley General Plan Update

Current Long-Time Member and President, Marin County Flood Control District Zone 3 Advisory Board

Current Member, Citizens' Oversight Committee of the Transportation Authority of Marin