



David Bruckman

GA Advisor of the Year

Firm: Apexium Financial LP

Designations: CLU®, JD*, MS Tax

Years in Industry: 17

Quotable Quotes: "Do something nice for somebody else every day."

Honors/Awards:

- GA Planner of the Year
- PREMIER PARTNERS® Advisory Council – Board member
- Westchester County Bar Association – Board member

Savvy advisors today use the latest technology tools to increase efficiency and provide better service to their clients. While David Bruckman agrees, he also believes there's still a place for the "old school" style of running a firm and serving clients.

"Technology plays an active and daily role in our practice, both for the advisors and our clients," David says. "But I'm kind of 'old school'—I still want to meet with my clients in person and I insist that our advisors not rely solely on virtual client relationships. Technology is a useful tool, but it can't replace the individual creativity and relationship skills of our advisors."

Perhaps the most useful technology tool for David is the client portal that enables clients to view their investments and run reports online. "Many of our clients also use eMoney to view aggregated accounts in one place and organize their documents, also online," says David.

Additionally, the use of customer relationship management (CRM) tools has improved efficiency and organization within the firm. "Bottom line," David says, "these tools enable me to serve my clients better."

Meanwhile, when working with clients on advanced planning and wealth transfer, David uses a combination of programs.

"Typically, we marry our proprietary Life Goals Planning visual illustrations with a cash flow scenario, such as that offered by Wealthy and Wise," he explains.

"And on the back office side, we use Envestnet as an investment trading platform," David adds. "This allows for better results and greater efficiency."