

Bruce Berman

Bruce is an investment advisor for Bright Futures Wealth Management, LLC, and owner of Lifetime Financial Group, where he leads a highly experienced team of open-minded individuals. To guide clients' financial planning, he emphasizes a comprehensive process that starts with listening to client's goals and concerns.

"I enjoy discovering creative financial planning solutions on a timely basis for my clients, who trust me enough to implement them," Bruce says.

Before starting Lifetime Financial Group in 1997, Bruce was a training manager, advisor, district manager and advisory council member for American Express Financial Advisors, originally called IDS Financial Services. Since 2011, he has been an invitee of Barron's the Winner's Circle "Best of the Best" and has been an active board member for Family Promise since 2015. Bruce received a B.A. from the University of Wisconsin at Madison, majoring in history.

When not sharing financial advice, Bruce enjoys paddle sports, collecting wine, listening to jazz, dancing with his wife and spending time with his two adult children. He also enjoys traveling, with favorite destinations including Santa Fe, Northern California and his condo in Madison, Wis. Over the years, Bruce has been a competitive tennis player, disc jockey and canoe instructor. [ADV PART 2B](#)