

# ABOUT THE SPEAKER:

Todd D. Bramson, CFP<sup>®</sup>, ChFC, CLU  
Senior Partner\*



North Star Resource Group

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## Specializing in Wealth Management for Physicians and Other Medical Professionals

**In addition to his financial planning practice, Todd D. Bramson is the founder and president of Bramson & Associates, LLC. Bramson & Associates, LLC is a marketing and consulting company dedicated to helping financial planners, registered representatives, brokers, and financial service organizations grow and thrive in this competitive industry.**

### PROFESSIONAL HIGHLIGHTS:

- At the 2004 MDRT, Todd presented his "You Can Have It All" workshop to 1,350 financial advisors from around the world. (Two Top of The Table, and six Court of The Table MDRT Qualifications.)
- Todd wrote a three hour CE class, "Ethics, Insurance, and the Financial Plan" and taught this to the Montana Association of Insurance and Financial Advisors in January of 2005 and to the Madison Association of Insurance and Financial Advisors in March of 2008.
- Todd is the author and creator of the *Real Life Financial Planning* book series, which now includes 11 books:
  - *Real Life Financial Planning*
  - *Real Life Financial Planning for the New Physician*
  - *Real Life Financial Planning for the Dental Professional, 1<sup>st</sup> and 2<sup>nd</sup> Edition*
  - *Real Life Financial Planning for the High Income Specialist*
  - *Real Life Financial Planning for the Young Lawyer*
  - *Real Life Financial Planning with Case Studies, 1<sup>st</sup> and 2<sup>nd</sup> Edition*
  - *Real Life Money Management for Pharmacists*
  - *Real Life Financial Planning for the Medical Professional*
  - *Real Life Financial Planning with Case Studies for Women*
- Todd is an Editorial Consultant with *Medical Economics* magazine and was listed 5 times as one of the "Top 150 Financial Advisers for Doctors". The most recent list was in November 2008.
- Appearances on Madison's local NBC Channel 15 5 p.m. broadcasts as their "Financial Expert". Provided over 130 live financial planning segments.
- Pioneered the concept of "Your Financial Hierarchy of Needs" as outlined in the August 1992 edition of *Doctor's Financial Report* (Prentice Hall Publication) and all eleven books in the *Real Life Financial Planning* book series.
- Quoted in issues of national publications *Money*, *Medical Economics*, and *Insurance and Tax News*.

## EDUCATION:

- University of Wisconsin-Madison, May 1983  
Degree: B.B.A. - Marketing and Risk/Insurance
- The College for Financial Planning, July 1990  
Designation: Certified Financial Planner (CFP)
- The American College, May 1992  
Designation: Chartered Life Underwriter (CLU)
- The American College, August 1992  
Designation: Chartered Financial Consultant (ChFC)

## CIVIC ACTIVITIES AND PERSONAL BACKGROUND:

- Recipient of Evans Scholarship in college and active member of Evans Scholarship Alumni Association.
- Past President of Blackhawk CC in Madison, Wisconsin.
- Active Member of Verona Area Community Theatre Group.
- Reside in Verona with wife Jerilyn and children Ali and David.
- Member of NAIFA and SFSP Professional Organizations.

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