beaconwealthconsulting, LLC

Susan J. Bruno, CPA, PFS, CFP®, Principal

Susan Bruno is a private wealth specialist creating distinct and customized solutions for high-net-worth individuals and families. Her extensive expertise in estate and tax planning is the basis for the comprehensive, multi-generational plans that she develops for her clientele. Susan and her team work hand-in-hand with their clients to oversee the implementation and ongoing management of those programs, helping to ensure that all aspects of the planning process are working in concert.

Susan carries numerous professional certifications and designations, is recognized among her peers for her leadership, advocacy and philanthropy, and is a frequent speaker at industry events. Much of Susan's expertise was acquired while she was a senior tax manager at Price Waterhouse, LLC (1987-1992), and as a senior tax consultant with Deloitte, Haskins & Sells (1984-1987). She graduated *magna cum laude* from Fairfield University in 1984 with a BS in accounting, and lives in Darien, Connecticut with her husband and two children.

Designations and Certifications

•Certified Public Accountant
•Personal Financial Specialist
•Certified Financial Planner™ professional

Advocacy & Community Involvement

•Member, American Institute of Certified Public Accountants
•Member, Connecticut Society of Certified Public Accountants
•AICPA Personal Financial Services Credentials Committee, 2007 to present
•Trustee, Lance Armstrong Foundation Endowment, 2004-2006
•Finance Chair, Board of Directors, Lance Armstrong Foundation, 2005-2006
•Member, The National Society of the Daughters of the American Revolution

Select Publications

•Contributing author, *Tips from the Top: Targeted Advice from America's Top Money Minds*, published by Alpha Ed.
•Contributing author, *The PPLI Solution*, published by Bloomberg Press
•Contributing author, *How Accountants Advise The Super Rich*, Private Wealth Magazine, June-July, 2007
•Contributing author, *Developing Rich Relationships with Women of High Net Worth*, wealthmonitor.com, 12/07
•Author, *"What Every CPA Should Know About Life Settlements"*, Journal of Accountancy, June, 2008, page 42, http://www.aicpa.org/pubs/jofa/jun2008/life_settlement.htm

Select Appearances

•Faculty, American Bankers Association Private Wealth Management School, 2003-2006
•Guest Speaker, Columbia University Executive MBA Program, *Using Life Insurance as an Investment Strategy*
•Panel Speaker, 2005 and 2006 MARHedge World Wealth Summit
•*Optimize Your Charitable Giving*, Greenwich, CT, 2005
•*Financial Wake-Up for Women*, Westport, CT, 2006/London, 2007 & 2008
•*Attracting and Retaining Female Clients,* Women and Wealth Forum, Institutional Investor, NYC, May 2007

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