



ESTATE STRATEGIES GROUP •

Bert Clark, JD, CLU[®], CFP[®], CAP[®], AEP[®]
Estate and Business Planning Advisor



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Education and Professional Certifications:

Berry College, Bachelor of Arts 1982, with honors
University of Georgia School of Law, JD 1985, with honors
CERTIFIED FINANCIAL PLANNER[™] (CFP[®])
Chartered Life Underwriter (CLU[®])
Accredited Estate Planner (AEP[®])
Chartered Advisor in Philanthropy (CAP[®])

Professional Affiliations:

Member, Atlanta Estate Planning Council (President, 2017-2018; Board Member 2015-2018)
Member, State Bar of Georgia
Member, Association for Advanced Life Underwriting
Lifetime Member, Million Dollar Round Table (Top of the Table, 1999-2017)
Membership in several wealth management and insurance trade organizations
Founding Member, Philanthropic Advisor Leadership Institute, Atlanta

Civic Affiliations:

Board of Directors, Woodruff Arts Center
Leadership Atlanta, Class of 2013
Board of Directors, High Museum of Art (former Vice-Chair; Executive Committee)
Board of Trustees, Berry College (Executive Committee; Chair, Student Life Committee)
Board of Advisors, University of Georgia Honors Program
All Saints' Episcopal Church: former vestry member, Sunday school teacher
Member: Piedmont Driving Club (Atlanta); The Honors Course (Chattanooga, TN)

Hobbies: Golf, running, collecting photography, travel

Family: Married to Cathy Catanzaro Clark; children: Ben, Matthew, and Julia

Practice Overview:

Before starting his wealth management and insurance advisory practice in 1997, Bert practiced law for eleven years in the areas of tax, estate, and business planning. Although he is no longer a practicing attorney, his clients benefit from his knowledge of the law and the interplay between wealth management, insurance and tax planning¹, especially in the areas of estate planning, business succession planning, executive benefits, and charitable gift planning. He is a frequent speaker at regional and national industry meetings, and to local and regional professional advisor groups.

Bert provides integrated planning solutions for high net worth clients and closely held businesses, and specializes in the comprehensive financial, wealth management, and estate planning for executives and business owners. In particular, he enjoys helping clients focus on the philanthropic impact of their wealth and in implementing solutions for the preservation of wealth.

Throughout his professional career, Bert has given back to his community through service to various cultural, educational, and professional organizations. He is currently the president of the Atlanta Estate Planning Council, and serves on the boards of The Woodruff Arts Center in Atlanta, The High Museum of Art, and Berry College. He also serves as an advisor to the University of Georgia Honors Program, and previously served on the boards of the Georgia Trust for Historic Preservation and The Atlanta Opera. He has played an integral role in the planned giving and capital campaigns for these and other organizations. He has also served on the planned giving advisory committees of the Community Foundation for Greater Atlanta and for Children's Healthcare of Atlanta, and was a founding member of the Philanthropic Advisor Leadership Institute in Atlanta. He is a former board member of Paralife Holdings, a Swiss company that focuses on life insurance and other financial products for microfinance markets in Latin and South America.

Bert is a native of Rome, Georgia and is the son of two schoolteachers. He and his wife Cathy have three children: Ben, a 2016 graduate of Middlebury College; Matthew, a senior at Wake Forest University; and Julia, a 12th grader at The Westminster Schools in Atlanta. Bert and Cathy are active members of All Saints' Episcopal Church and numerous other civic and educational organizations. Bert is an avid golfer and runner, and enjoys collecting photography.

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¹ Please consult your tax accountant or attorney for tax advice.