



## **Bruce T. Roepe, J.D.**

**Associate Account Executive**

**John G. Ullman & Associates, Inc.  
30 East Market Street  
Rhinebeck, New York 12572  
Phone (845) 876-4499  
Fax (845) 876-3375  
roepeb@jgua.com**

*Bruce brings his legal training and experience as an attorney to his role as a financial planning advisor. He believes that the best results are obtained through long-term strategic planning and follow-through, and that clients of all income levels can take steps to minimize the impact of the tax laws on both their earnings and savings. Such steps include, but are not limited to, tax-advantaged savings and investments, employer/employee benefits planning for individuals and small businesses, Social Security analysis, insurance, and education planning. The Rhinebeck office is thrilled to have Bruce join the firm and together with Barbara Markell, CFP®, they provide the complete array of comprehensive wealth management services John G. Ullman & Associates, Inc. is known for.*

## **Credentials**

- University of Pennsylvania Law School, J.D.
- Colgate University, BA (*Cum laude*)
- Admitted to practice law in New York
- Passed the CFP® exam given in March, 2011 and is a candidate for CFP® certification.

## **Background**

After graduating from law school, Bruce practiced in commercial litigation, secured transactions, debtor-creditor relations, and real estate law. Bruce and his wife and daughter are currently making the transition to the Rhinebeck/Red Hook area and look forward to making a positive contribution to these communities.

## **Areas of Expertise**

- Retirement Planning
- Employer/employee benefit plans
- Education Funding Analysis

