SUCCESSION CAPITAL
ALLIANCE ™

MICHAEL J. ROTHMAN, CFP

Executive Vice President

Michael Rothman has an in-depth understanding of advanced tax and estate planning techniques as well as sophisticated leveraging and wealth preservation strategies. Working with Succession Capital Alliance (SCA) since 2000, and officially becoming the Executive Vice President in 2012, Michael has successfully placed billions of dollars of life insurance using the CMS program.

Working directly with Financial Advisors and their High Net Worth clients, Michael has a recognized expertise in the Premium Financing space, and is a sought after Industry speaker on the topic to Financial Advisors around the country.

Emerging from an inventive partnership between CMS Inc. and a Fortune 20 company, Succession Capital Alliance was formed in 2004 to address a void in the understanding and communication of life insurance among advisors, high-net-worth individuals, and business.

Succession Capital Alliance is a boutique firm specializing solely in advanced life insurance planning. With a complete focus on permanent life insurance, our expert team is adept at uncovering opportunities, devising custom strategies and implementing artfully crafted case designs that maximize results for high-net worth clientele over the long term.

Today, Advisors throughout the country utilize CMS and SCA for their high-net-worth clients for estate and succession planning purposes. This collaboration has resulted in the placement of more than $44 billion of life insurance coverage, with a financed premium portfolio that now exceeds $4 billion.