



President, Founder, CEO  
Top Producer, Speaker, Trainer, Author  
*Newport Beach, California*

### Career Summary

- Icon of Life insurance industry over 40 years
- CEO of 2 Corporations & Training Program
  - Rushmore Private Client Group—1981
  - The Settlement Masters—2008
  - VBRC: Advisor Training —2021
- STEP Member & Speaker
- Speaker and Trainer
- Board Member: *Pristine/Hydro LLC*
- *Settlement Masters—Insurance Broker*
- Preferred Broker for *Abacus Settlements, LLC*
- Journal of Taxation: Article Co-Author  
"Taxation of Life Settlements"—October 2009
- New York Life Insurance Top General Manager
- Radio talk show host
- National Podcast Speaker

**Industry great**, Bob Larsen, has helped the wealthy and super wealthy understand and implement innovative tax strategies for over **five decades**, earning him the reputation throughout the financial community as the advisor who **"Keeps Wealth in the Family"**.



# Robert W. Larsen, CFF<sup>®</sup>, TEP

## Liability, Tax, & Wealth Strategist

Bob began his career in the Financial Services industry with the New York Life Insurance Company over 40 years ago, he was quickly promoted to General Manager where he led the agency to its highest levels company-wide.



Bob resigned from New York Life in 1981 and formed The Rushmore Group Inc. to assist corporate owners and high-net-worth individuals protect their corporate assets and maximize the value of tax strategies, by using well-proven but not openly known techniques and strategies.

The Rushmore Group research team strategizes with the brightest legal and accounting minds across the country to analyze and implement these unique ideas to realize their clients' dreams.

Bob places a special emphasis on the simplification of complex concepts as they relate to business, family and a client's personal goals. High-level professional relationships developed as a member of the London-based Society of Trust and Estate Practitioners, also known as S.T.E.P., helped create a seasoned understanding of the needs of highly successful individuals and business owners, and develop strategies that can change the outcome of their life's work.



As a nationally licensed life settlement Broker, Bob developed higher compliance standards and created a comprehensive process recognized by **Lloyd's of London** as *the most compliant, transparent, and accountable* within the settlement industry.

Bob has **authored and co-authored** many publications, such as the article published in the prestigious **"Journal of Taxation"**, and is frequently asked to speak at national industry events and education seminars for accountants, lawyers, and community business leaders.

As a visionary with a strong entrepreneurial spirit, and founder of two successful companies: the Rushmore Private Client Group (in 1981) and Settlement Masters, LLC (in 2008), and as a result of his years of experience in working with high-net worth clients and collaborating with top-rated attorneys and CPA's, Bob's knowledge of estate planning and tax liability strategies along with his effective techniques and skilled communication methods created the desire to share his valuable expertise with industry leaders. Because of his strong belief in continually pursuing his own personal & professional growth, this ideology propelled Bob to establish the uniquely distinctive membership program, (VBRC) to help others reach their full potential.



VALUE BASED REVENUE COACHING  
— VBRC —

Keeping Wealth in the Family

