

Roberto H. Bruce

MS, CLU, ChFC, LUTCF



Graduating from the Philippine Military Academy (PMA) as Salutatorian, Roberto joined the Philippine Navy and retired as a Navy Captain to migrate to the United States with his family. Roberto has a Master's Degree in Computer Systems Management from the U.S. Naval Postgraduate School in Monterey, California. As an insurance agency builder since 1986, Roberto has also earned industry designations such as Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), and Life Underwriter Training Council Fellow (LUTCF) from The American College. Roberto served in the Northern California local board of the National Association of Insurance and Financial Advisors (NAIFA) for seven years and became its President in 2004.

Having served for nine years as a Regional Director of Surety Life, an Allstate Company, he joined nineteen other Surety Life Regional Directors in 1999 to form Alliance #1, Inc. as a National Insurance Marketing Organization. Alliance #1 Inc. carries several companies in its portfolio. Roberto specializes in 5 of the companies: American Fidelity Assurance Company (AFA), American National Insurance Company (ANICO), Assurity Life, Lincoln Benefit Life (an Allstate Company), and Sagicor Life. He has been the President of Alliance #1, Inc. in the last 4 years.

Roberto's motto is to ***"Always Excel"*** which is exemplified by his willingness and drive to provide the best service and assistance to those that he is working with. While in the Philippine Navy, Roberto received the prestigious Ship of the Year Award for 4 consecutive years. In the insurance industry, Roberto has garnered several awards for agency building and sales. Since 1986, Roberto has been in the forefront of agency recruitment, training, and production.

With his expertise in Direct Fund Transfers, Pension Plans, Wealth Transfers, and IRA rollovers, Roberto can help connect you to the services that best fit your needs.

Roberto is ably assisted by his loving wife Lorna, who is also a licensed agent since 1990.

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