

ROCKBRIDGE

group

Edmund Perry, JD, Founding Principal



Professional History & Education

Edmund Perry is a founding principal of RockBridge Group.

With extensive legal practice experience in the areas of finance, tax and business transactions, twenty years in executive leadership roles and a decade assisting and advising clients in wealth preservation and transfer, Edmund brings unique perspective and knowledge to RockBridge. After beginning his career as a private-practice attorney, he served as senior legal counsel for a NYSE-traded energy company engaged in interstate natural gas transmission, oil & gas E&P, and offshore contract drilling. He launched and managed marketing, sales, new business administration and product development for a line of business at a NYSE-traded life insurance company. Edmund's background and experience enable him to relate well to his clients and their professional advisors and be an active, effective contributor to the planning process.

Edmund enjoys working with professional advisors to solve problems and achieve client goals, and he oversees RockBridge's analytical functions and *Client Experience*.

Edmund earned his J.D. from the Yale Law School (1985) after graduating Valedictorian, first in his class and *summa cum laude* from Washington & Lee University (1982, English).

Personal/ Interests

Edmund resides in Birmingham, Alabama with his wife, Ann. They have three adult children: Elizabeth, a budding novelist and PhD candidate at Texas A&M; Kate, jointly pursuing her Masters in Forestry and MBA at Duke; and Edmund Jr. who, as part of a Washington, D.C. boutique, advises commodities brokers and exchanges, financial markets firms, and cryptocurrency / blockchain pioneers before Congress and Administrative Agencies.

Securities offered through M Holdings Securities, Inc., a registered Broker/Dealer, Member FINRA/SIPC. RockBridge Group, LLC is independently owned & operated.