Advanced Planning Group



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David Toups is a Corporate Vice President and Advanced Planning Consultant with New York Life Insurance Company, supporting agents working in the South Central Zone.

David joined New York Life in 2016 as a case design consultant for The Nautilus Group®, a service of New York Life, where for over eight years he provided in-depth analyses and explanations of multi-faceted estate, trust, asset protection, and business planning strategies. Prior to coming to New York Life, David spent more than 14 years in the private practice of law focused on estate, trust, and business litigation. He has also practiced law with several other prominent law firms in complex tax, estate, and business planning matters, as well as served as a consultant to wealthy individuals, business owners, and their professional clientele.

David obtained his B.A. in business from Texas A&M University; his MBA, with an emphasis in finance, from Sam Houston State University; and his J.D. from South Texas College of Law, where he graduated with honors. Further, David has served as an officer in the United States Marine Corps. He has also earned the Chartered Financial Analyst®, Certified Financial Planner®, and the Certified Trust and Financial Advisor® designations. David is admitted to practice before the Supreme Courts of the United States and Texas.

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