



Bill Anderson, CLU, ChFC, CKA

E4 Insurance Services

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Background & Experience

Bill Anderson has been in financial services since 1988 specializing in estate, wealth, charitable, business succession and executive compensation planning for ultra-high net worth families, business owners, and senior executives with estates ranging from \$7 million to \$2 billion. Bill is a specialist in the implementation and design of advanced planning strategies for families of significant wealth, entrepreneurs, and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multigenerational wealth strategies, frequently in tandem with philanthropic techniques.

Previously, Bill worked at Met Life Private Wealth Management as a Regional VP and Ultra High Net Worth Specialist. Prior to that he was a Financial Planner and Principal with LB Financial Services.

Bill has earned the Chartered Life Underwriter (CLU) from The American College as well as the Chartered Financial Consultant (ChFC) designation from The American College. He also has FINRA Series 7 & 63 licenses.

Certifications & Education

- Augsburg College, Minneapolis, MN - Finance and Economics Degree