



Daniel E. Peterson, LLIF, LUTCF, FIC

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Background & Experience

Dan Peterson is President and one of three Managing Partners of E4 Insurance Services, a national independent Brokerage General Agency. E4 offers Life Insurance, Annuities, Long Term Care Insurance, and Disability insurance. E4 provides services to Financial Advisors, Accounting Firms, Trust Departments, and Financial Institutions for life insurance planning and reviews, estate planning, farm and business succession planning. Peterson is considered an expert in the areas of Life Insurance Policies, Bank Owned Life Insurance (BOLI), Estate Planning, and Deferred Compensation, Farm and Business Succession Planning. He has served as an insurance expert consultant to top 25 Accounting Firms and assisted in conducting audits of insurance policies, Irrevocable Life Insurance Trusts (ILITs) and premium financing programs within Bank Trust Departments. For years, Dan has worked closely with family farms and closely held businesses, helping them develop their succession and estate plans. He has developed a network of advisors, accountants, and estate planning attorneys who specialize in this area.

In 2010, Peterson was elected to a national insurance post, becoming a Director for the National Association of Independent Life Brokerage Agencies (NAILBA). He is also a member of the Government Affairs Committee for NAILBA. Peterson is President of the FM-AM Rotary service club, is 2018-2019 President of National Association of Insurance and Financial Advisors – North Dakota (NAIFA-ND), is a past Director for the National Association of Independent Life Brokerage Agencies (NAILBA), is a member of the Red River Estate Planning Council, the ND Ambassador for the Association for Advanced Life Underwriting (AALU), and is Past President and current Director of the Tulaby Lake Association. Dan has the LUTCF designation through the American College and the LLIF designation through LIMRA and Babson College. Peterson holds his Series 6 and 63 securities licenses and is a registered representative of the Leaders Group, Inc. Peterson and his wife of 29 years, Annette, have two sons- Jordan and Jesse. They reside in Horace, ND and enjoy their lake cabin in Minnesota. Dan also is a tournament walleye fisherman and an avid hunter.

Certifications & Education

- Liberty University, Lynchburg, VA - Business Administration