

James C. Peterson, JD, CPA_{inactive}, CLU, CHFC
CEO, Aware Financial, LLC

Business Address

2173 Kentucky
8891 Airport Rd, C-4
Blaine, MN 55449

Business Phone Number

651-282-0012

Business Fax Number

763-792-1045

Email Address

jimp@awarefinancial.com

Jim Peterson serves as the CEO of Aware Financial, LLC, an independent insurance agency that specializes in auditing life insurance portfolios and structuring insurance for business continuation and estate planning applications. Jim received a Juris Doctor, cum laude, from William Mitchell College of Law and a Bachelor of Science in finance with honors from the University of Wyoming. He is a member of the Minnesota State Bar Association, Ramsey County Bar Association and the Minnesota Society of Certified Public Accountants. As President of WorthMark Financial Services, Jim built and operated several broker dealers and insurance agencies. He has published several articles in national journals and lectured nationally on estate and business planning. He spent ten years with Minnesota Life where he directed the Advanced Life Marketing department and the Individual Life and Disability insurance marketing department. For eight years, Jim was publisher of the national monthly newsletter, Financial and Estate Planning: INSIGHTS & STRATEGIES. Jim is a former Tax Manager at Deloitte & Touche and a fee-based financial planner at the Resource Companies.

