

## James C. Peterson, JD, CPA<sub>inactive</sub>, CLU, CHFC

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Jim Peterson is the owner of Aware Financial, LLC, an independent life insurance agency that specializes in auditing life insurance portfolios and structuring life insurance for business continuation and estate planning applications. Aware is distinguished from other insurance providers in its depth of knowledge and understanding of insurance products as well as the tax and financial aspects of estate and business continuation planning.

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 started in the financial services industry as a fee-based financial planner for ultra-high net worth clients at the Resource Companies, followed by nearly four years with Deloitte & Touche where he was a Tax Manager. Jim then spent ten years with Minnesota Life where he was Director of Advanced Life Marketing and Individual Life and Disability Insurance Marketing.

For eight years, Jim published the national monthly newsletter, Financial and Estate Planning: INSIGHTS & STRATEGIES. He has authored several articles in national professional journals and lectured nationally on estate and business planning.

Before creating Aware Financial in 2005, Jim was President of WorthMark Financial Services where he designed, built, and operated several broker dealers and insurance agencies that focused on strategic alliances with banks, property and casualty agencies, attorneys, and accountants. Aware Financial is an agency that focuses exclusively on life insurance for complex and high net worth situations and refers client investment management needs to other professionals.

