

Bruce D. Peterson CLU

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QUALIFICATION SUMMARY

Product and sales expertise with stocks, bonds, mutual funds, annuities, life, medical, disability, long-term care insurance. Experience in the financial, retirement and estate planning process. Pension expertise including 401k, 403B experience. Work experience also includes recruiting hiring and training expertise.

EDUCATION

Bachelor of Science Degree
Finance Major
Northwest Missouri State University
Maryville, Missouri
June 1975

Chartered Life Underwriter
The American College
Bryn Mawr, Pennsylvania
June 1984

EXPERIENCE

Great Plains Annuity Marketing
Vice President
Overland Park, Kansas
June 2005-Present
Involved in the wholesaling of insurance products. Developed a successful annuity appointment program for agents and brokers

Central Bancompany - InvestorServices Inc.
Financial and Retirement Planning Consultant
Located at Ozark Mountain Bank
Branson, Missouri
1996-2005
In addition to achieving \$400,000+ in gross dealer commissions (GDC), I was involved in the setting up of offices throughout the state of Missouri. Responsibilities included negotiating investment and insurance contracts as well as insurance training for twenty-eight Series Seven Registered Representatives. A prolific seller of annuities, I was honored by Nationwide Insurance Company as the best in the country in three different years.

Northwest Financial Services

Financial Planner

Located at Northwest Federal Savings Bank
Spencer, Iowa

1989-1996

Created a Financial and Retirement Planning marketing process that tripled sales results. This system is very successful for those in the financial services industry that are struggling to achieve multiple sales during one appointment session. .

Bradford and Byron Inc.

Vice President of Marketing
Seattle, Washington

1983-1989

Involved in wholesaling of insurance products.
Biggest retail client was Lutheran Brotherhood. The company has been sold.

Seabury and Smith Inc.

Account Executive
Subsidiary of Marsh and McLennan
Des Moines, Iowa

1978-1983

#1 Salesperson for four years. Wholesaled and retailed group medical, dental etc. Also, marketed individual investment and insurance products to small business owners

Mutual of Omaha

Small Group Sales Representative
Omaha, Nebraska

1975-1978

Training agents to sell group insurance products.

LICENSES

Life, Health, Property & Casualty, Series 7 and 63