e4 Brokerage, LLC
People Making a Difference

energy • energize • edge • execution

e4 Brokerage Expertise

Dan Peterson, LLIF, LUTCF, is the President and CEO of e4 Brokerage. He is known for his innovative approaches and creating a culture that is quick, responsive, accurate and knowledgeable. Throughout Dan's distinguished career of more than 20 years in the insurance industry, he has successfully developed high-level revenues for hundreds of agents and several agencies.

e4 Brokerage, LLC, is an independent brokerage agency that offers high-level expertise for insurance professionals throughout the country. We provide top-tier resources for advisors working with advanced markets and the trust-owned life insurance marketplace. e4 Brokerage also works directly with banks to provide solutions to optimize their risk adjusted returns using Bank-Owned Life Insurance (BOLI), through a contract with Meyer-Chatfield, one of the largest BOLI distributors in the country.

Our innovative planning and review process for independent insurance professionals, trust departments, accounting firms, estate planning attorneys, and financial institutions allows you to make a difference for your clients. We can provide you with the resources and expertise to succeed.

- Large premium life insurance case expertise
- Advanced Markets
- Building referrals among your client base
- Life, Annuity, LTC and DI product expertise
- Underwriting analysis to markedly improve the offers your clients receive
- Policy review

Need results from your insurance business? e4 Brokerage combines innovative approaches with a culture that is quick, responsive, accurate, and knowledgeable to provide impressive results.

We believe in a very simple formula for success:

"e" to the 4th Power -
Energy – Energize – Edge - Execution

e4 Brokerage can provide everything you need for powerful results.

e4 Brokerage is a partner office of Partners Advantage Insurance Services, LLC. The strength of e4 Brokerage comes from the expertise and personal focus they provide each agent. This unique hands-on approach is enhanced by the size and top-tier technology provided by Partners Advantage; which helps e4 Brokerage bring agents the best resources and contract levels available.

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AiM Policy Review

"AiM" for the most out of life

Leverage the Power of AiM Policy Review

The **AiM Policy Review** from e4 Brokerage helps advisors and their clients maximize their life insurance policies. The process takes advantage of the latest innovations, products, and financial strategies available.

The three-step process can help you evaluate your clients' current policies. We provide you with guidance on the various and continual changes in the life insurance industry (interest rate changes, new health classifications, carrier ratings changes, etc.) and ensure that your clients are getting the most out of their life insurance policies and annuities.

3 Steps

Analyze • Improve • Maximize

Analyze - Our agency will take an objective look at your policies, one by one. We review why the policies were originally purchased and whether they still meet the clients' financial objectives. We incorporate new obligations and goals in your clients' lives, along with other issues that affect their life insurance needs. We also make certain your policy performs as you planned, isn't underfunded, and that it will be there whenever it is needed.

Improve - Once we have completed that analysis, we will help you compare your clients' current policies to others available in the marketplace. We may find that the policies continue to be well suited to their financial needs. But we often discover that their program can be improved, taking advantage of the latest innovations and improved pricing available in the industry. We will ensure that you are working with top-rated carriers that are highly regarded in the industry. e4 Brokerage brings you access to the top-rated financial carriers, so we'll present comparisons that provide improved performance, not just lower premiums or increased coverage.

Maximize - Your clients' long-term financial interests are our top priority. We go beyond analysis and improvement of your clients' policies and find ways to meet their goals for the future.

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