



Bill Anderson
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Bill Anderson has been in financial services since 1989 specializing in estate, wealth, charitable, business succession and executive compensation planning for ultra-high new worth families, business owners, and senior executives with estates ranging from \$7 million to \$2 billion. Bill is a specialist in the implementation and design of advanced planning strategies for families of significant wealth, entrepreneurs and professionals. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies, frequently in tandem with philanthropic techniques.

Previously, Bill worked at Met Life Private Wealth Management as a Regional VP and Ultra High Net Worth Specialist. Prior to that he was a Financial Planner and Principal with LB Financial Services.

Bill has earned the Chartered Life Underwriter (CLU) from The American College as well as the Chartered Financial Consultant (ChFC) designation from The American College. He also has FINRA Series 7 & 63 licenses.

EDUCATION

- Augsburg College, Minneapolis, MN
Finance and Economics Degree