Brad Peterson, CLU®, LLIF, CLTC®
Vice President, Insurance
614.340.3680 | bpeterson@sequoia-financial.com

As the team leader for insurance advisors, Brad works with clients to develop creative insurance strategies that help protect their future and align with their financial plan. His team will design a customized insurance program personalized to a client's unique financial situation. His goal is to provide quality coverage with the best value available in the market.

More than 30 years of insurance industry experience provides Brad with a refined perspective in designing an insurance strategy that is tailored for a client's individual financial objectives. Clients who work with Brad can expect transparent communication, open dialogue, and a team dedicated to serving their best interests. His role is centered around helping clients protect what they have worked so hard to build and to leave a lasting legacy for the future. Brad cares deeply about what matters most to his clients.

Chartered Life Underwriter® (CLU®)

LIMRA Leadership Institute Fellow (LLIF)

Certified in Long Term Care® (CLTC®)

Series 6, 26, and 63 registrations through ValMark Securities, Inc.

Member, Society of Financial Services Professional – Columbus Chapter (FSP)

Member, Worthington Estate Planning Council

University of Toledo, Bachelor of Business Administration in Finance