

MEET DAN



DAN SPENCE
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Dan is proud to be a 3rd generation life insurance professional. Dan's grandfather started selling life insurance in the 1920s and his dad followed in the 1950s. Dan entered the industry as a career agent with National Life of Vermont in 1980.

In 1987, he accepted a position with Indianapolis Life as a Regional Director of Agencies, and then became a member of the Advanced Marketing team 12 years later in 1999. Most recently, Dan moved from Des Moines, IA to Nashville, TN to join AIG's Advanced Sales Team.

Dan earned his bachelor's degree in business from Indiana University and his MBA from Anderson University. Dan also has CLU and ChFC designations from the American College.

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1 (855) 323-6923

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MEET THE ADVANCED SALES TEAM

The Advanced Sales Team is prepared to provide you with innovative solutions in the following subjects:

FOR INDIVIDUALS AND FAMILIES

- Estate Planning
- Estate Tax Planning
- Estate Equalization
- Wills and Trusts
- Irrevocable Life Insurance Trusts
- Annual/Lifetime Gifting
- Family Limited Partnerships and LLCs
- Other Wealth Transfers
- Generation Skipping Planning
- Income Tax Strategies
- Retirement Planning
- Retirement Distribution Planning
- Charitable Giving and Trusts
- Private Financing
- Premium Financing

FOR BUSINESS OWNERS AND THEIR BUSINESSES

- Business Continuity
- Key Person Planning
- Executive Benefits
- Deferred Compensation Plans
- SERPs
- Split-Dollar Programs

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