

Brokerage News

Bringing income protection to light.

Contents

- Behind the Name Change..... 1
- Meet the Team..... 2
- Meet the Team, Continued..... 3

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 **PACIFIC**
ADVISORS

is now...



Behind the Name Change


Over the last 15 years we have grown into a national leader in the disability income brokerage arena. Thanks to the business you trust us with and the colleagues you have referred, we serve advisors in 50 states, have earned preferred partner status from the carriers we work with and are annually recognized as an industry leader.

As Pacific Advisors, we always strived to help you find the most appropriate income and asset protection solutions for your clients. And now — to better reflect our national footprint, unparalleled knowledge, dedication and responsiveness — we've changed our name to Truluma.

Truluma expresses how we remain true to being an “advisors first” firm and light the way to income protection solutions for your clients.

We are still the same people. We still have the same commitment to you. Now we do it with a new name, along with the same dedication to helping you grow your business.

Thank you for your continued support and the dedication you bring to your clients making sure their most important asset is protected... their ability to earn an income.



Jeffrey J. Peterson, CLU | President & CEO

Meet the Team



**Jeffrey Peterson, CLU,
CEO and DI Consultant**
Jeff@truluma.com

Jeff started in the financial services industry in 1990 after earning a degree in Economics from University of Washington and founded Truluma (then Pacific Advisors) in October of 2000 to provide advisors with a single access point to the income protection marketplace. Pulling from his experience as a Million Dollar Roundtable producer and Disability Income Specialist, Jeff modeled Truluma as an advisor-first firm, a principal which continues to guide the company today. Jeff has spoken at numerous NAIFA, FPA and International DI Society events across the country however spends the majority of his time setting Truluma's direction and managing carrier relations. When not in the office Jeff can be found watching or playing soccer, traveling, attempting to perfect his BBQ skills or seated at a University of Washington sporting event.

Favorite food: Italian or Mexican — I could eat either every day.

Spirit animal: A Husky of course!

Random fact: I've been to every state in the U.S.



Jeffrey Kerns, Vice President, DI Consultant
JKerns@truluma.com

Jeff is Vice President of Truluma. He was born and raised in the Seattle area and graduated from Central Washington University. He started in the financial services industry in 1997 and has been a featured speaker at many industry events. He has also served in leadership roles with the NAIFA South Sound Chapter. Having extensive product knowledge in income protection, he works with advisors to provide quality products to their clients. Jeff also appreciates spending time with friends and family and he coaches youth basketball for both of his sons' basketball teams. He loves traveling, paddle boarding, kayaking and golfing.

Favorite book: *Boys in the Boat* is a recent favorite.

Spirit animal: A Monkey.

Random fact: I'm a bit of a foodie.



Megan Tay, CLTC, DI and LTC Consultant
Megan@truluma.com

With 20 years in the insurance industry, Megan's role at Truluma is to support and coach advisors in educating their clients about income and asset protection. She also conducts informational seminars and participates in joint meetings. She was born and raised in Bellevue, WA and after graduating from Notre Dame, she began her career as a wholesale representative for Unum's individual product portfolio. When not working, Megan can be found at the gym every morning and spending time with her family and friends in the evenings. She loves traveling and experiencing new places.

Favorite restaurant: I enjoy restaurants the locals eat at while traveling.

Favorite place: A tie between London and Cote d'Azur.

Random fact: I was on a TV show when I was a child.

Brokerage News: Volume 17 No. 4



Lynn Christofferson, DI Consultant
Lynn@truluma.com

Lynn entered the insurance industry in 1987 and has specialized in Income Protection planning since 1991. She brought her experience and expertise to Truluma in 2008 where she helps advisors understand the importance of talking to clients about income protection. Lynn was diagnosed with a chronic illness which makes her unisurable and unable to purchase more disability insurance. She shares this story with advisors and clients alike to underscore the importance of obtaining coverage. When the weather is nice, Lynn can be found on her boat enjoying the water and still answering emails.

Favorite band: The Beatles.

Most proud of: Staying married for 32 years.

Random fact: I fostered troubled teenagers.



Geri Everett, CLU, LUTCF, DI Consultant
Geri@truluma.com

Geri entered the insurance industry in 1989 and has helped advisors find appropriate income protection solutions for their clients since 1996. During her career, Geri has served as the President of the Albuquerque and Sante Fe NAIFA chapters and has taught certified continuing education courses throughout the Southwest. As a DI Consultant at Truluma Geri provides advisors with plan design expertise and helps them educate their clients about the important role income protection plays in a comprehensive financial plan. Geri loves to travel and like to laugh everyday, trying not to take life too seriously.

Favorite band: Tom Jones

Most proud of: My sense of humor.

Random fact: I took flying lessons and flew a small plane.



Brian Leet, FMLI, MBA, DI Consultant
Brian@truluma.com

Brian came to Truluma with more than 10 years of experience working with individual disability insurance with a solid understanding of the DI marketplace which includes extensive product knowledge as well as case design for individual and multi-life sales. Brian's role is to help educate advisors and their clients on income protection solutions that are available to them. Prior to coming to Truluma, Brian was the Manager of Individual Disability Insurance Sales Programs for The Standard Insurance Company where he helped design and market new products. Brian is a native Oregonian and graduated from University of Oregon with a degree in business and an emphasis in marketing and finance. He also earned an MBA from George Fox University. Brian enjoys spending time with his wife and two kids and loves traveling and rooting on the Oregon Ducks.

Favorite pizza topping: Pepperoni and pineapple.

Favorite season: Football.

Random fact: I tried out for College Jeopardy once.

Meet the Team



Shalanée Joyner, Internal Sales Consultant
Shalane@truluma.com

Shalane joined Truluma in 2016. She was born and raised in Seattle and graduated from Chapman University with a degree in Political Science and French. During college she had a variety of experiences including interning in Washington D.C. several times. Shalane is excited about her new career at Truluma and looks forward to growing in the industry. Outside of work she enjoys traveling, hiking, cooking and spending time with friends and family.

Ocean or mountains?: The ocean. I love being by the beach.

Spirit animal: A giraffe.

Random fact: I've interned in Washington D.C. three times.



Cari Crandall, New Business Coordinator
Cari@truluma.com

Cari joined Truluma in 2012 as a New Business Coordinator where she works with advisors to find the best and most affordable income protection options to meet their clients' needs. Cari has lived in Bellevue, WA her entire life, attending both Bellevue High School and Bellevue Community College. She enjoys being outdoors, gardening, being creative, doing DIY projects and spending time with her children and husband.

Most proud of: My very rad kids.

Favorite band: Brandi Carlile - she is the best!

Random fact: I've been told I'm a pretty good artist, especially drawing.



Amy Kirstein, New Business Coordinator
Amy@truluma.com

Amy joined Truluma in 2014 as a New Business Coordinator, finding the best DI and LTC solutions for the clients of her advisors. Amy grew up in Snohomish, WA and graduated with a degree in public health from the University of Washington. Amy enjoys golfing, cooking, listening to music and playing games with friends.

Superhero power I'd choose: Breathing under water.

Most proud of: Buying my own house.

Random fact: I enjoy building things like my deck, and working with power tools.



Sarah Reijnen, New Business Coordinator
Sarah@truluma.com

Sarah joined Truluma in 2014. As a New Business Coordinator, she helps her advisors find DI and LTC insurance to meet their clients' needs and budgets. Sarah grew up in Grass Valley, CA and has Masters degrees in both English and Education. As a recent transplant to the Pacific Northwest, Sarah loves embarking on new adventures and enjoys running, traveling, writing and sailing.

Special skill: I can wiggle my ears separately and together.

Spirit animal: Anything fluffy or awkward.

Random fact: I've visited more countries than U.S. states.



Kelly Peterson, Licensing Manager
Kelly@truluma.com

Kelly joined Truluma in 2006 after 15 years in the wireless industry. She currently manages licensing and compliance for Truluma. Kelly grew up in West Linn, OR and graduated from the University of Oregon with a degree in Journalism. She enjoys helping her husband, Jeff Peterson, run Truluma and spending time with their two teenagers.

Favorite pizza topping: Artichoke hearts.

Special skill: I'm really good at Wheel of Fortune.

Random fact: I worked on the very first version of text messaging for mobile phones back in 1994 (you're welcome).



Natasha Loftin, Policy Services
Natasha@truluma.com

Natasha joined Truluma in 2009 as a New Business Support Member and has since moved into policy services where she assists with enforce policy change requests and correspondence. Natasha graduated with a degree in psychology from the University of Washington. She enjoys cooking, traveling and spending time with her husband and three sons.

Favorite music: Country.

Spirit animal: Dogs - especially Black Labs.

Random fact: I'm a huge Seattle sports fan (Mariners, Huskies, Seahawks).



Jaymie Mayers, Marketing Manager
Jaymie@truluma.com

Jaymie joined Truluma in 2008 as the Licensing Manager, and became the Marketing Manager in 2013. She creates all of our direct marketing pieces, newsletters and email communications as well as designing customized sales materials for advisors. She grew up in Pasco, WA and graduated from the University of Washington with a degree in psychology. She enjoys photography, music and spending time with her husband and daughter.

Superhero power I'd want: Ability to teleport and avoid traffic.

Favority activity: Photography, particularly of my active toddler.

Random fact: I was born in Japan.



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