Bill Boersma

Professional Summary

Bill has spent his entire career specializing in life insurance. He predominantly works with wealthy business owners and professionals regarding insurance for estate planning, business succession and charitable strategies. Bill is generally introduced by estate planning and business attorneys, CPAs, trust officers, family offices, non-profit leaders and various financial planning professionals.

Recognized nationally as an expert in life insurance, Bill utilizes his experience and expertise to be an effective ally for policy holders and their professional advisors. From designing strategies to implementing solutions to ongoing management and consulting, he tends to challenge industry orthodoxy and provides a refreshingly candid take on life insurance while benefitting clients through a pragmatic process.

Whether Bill is sought out for a simple second opinion or to provide the most thorough analysis available, his work is consistently recognized as bringing unparalleled value to policy owners and advisors. Another growing aspect of Bill's practice is litigation support and expert witness testimony. While his work results in most cases avoiding trial, he has courtroom experience as well as FINRA arbitration experience.

Bill has written for, been featured in or quoted by a number of financial and industry periodicals, websites, radio and television. He regularly speaks for estate planning councils, legal, accounting and trust management conferences and financial and insurance associations.

Contact Information

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Areas of Expertise

Life Insurance Consulting
Analysis & Management
Litigation Support
Expert Witness Services
Acquisition & Divestiture Support
Portfolio Optimization
Policy Valuations
Tax Analysis
Life Settlements
Industry Speaking & Education

Academic Background

Calvin College, BA Business, 1990
GVSU, MBA studies, 1990-1992

Professional Licenses

Chartered Life Underwriter (CLU)
Licensed Insurance Counselor (LIC)
Accredited Estate Planner (AEP)

Professional Experience

CIGNA Financial Advisors 1992-1996
Advantage Planning Strategies 1996 - Present
Lawson Insurance Services / LIS Brokerage 1996 - Present
Opportunity Concepts / OC Consulting Group 2004 - Present

Professional Associations

National & Michigan Association of Insurance and Financial Advisors, Former Pres.
Michigan Association of Licensed Insurance Counselors, Former Pres.
National and Local Society of Financial Service Professionals, Former Pres.
National and Regional Association of Estate Planners and Counsels, Former Pres.

Speaking Engagements

Bloomberg
Journal of Financial Service Professionals
Various Estate Planning Counsels throughout the country
Various Insurance Associations throughout Michigan
Michigan Bankers Association
Michigan Association of CPAs
Michigan Bar and ICLE
Michigan Forum of Estate Planners
Notre Dame Tax and Estate Planning Institute
Heckerling Institute approved private seminars

Writing / Quotes / Media / Featured

Wealthmanagement.com, NAEPC Journal, Accounting Today Wall Street Journal, Trusts & Estates, California Broker, National Underwriter, Washington Post, CNN, Fox Business Network, Grand Rapids Press, Grand Rapids Business Journal, InsuranceNewsNet Magazine, Michigan Lawyers Weekly, Idaho Business Review