

Terri Getman, J.D., CLU, ChFC, RICP,  
AEP (Distinguished)



Terri Getman is a nationally recognized lecturer, author and advisor to financial representatives who provide advice to families and privately-held business owners across the U.S. For more than 30 years Terri has specialized in the appropriate use of life insurance in client's estate, business and executive benefit plans.

Terri received her undergraduate degree from the College of William and Mary, in Williamsburg, Va., and the juris doctorate from Drake University School of Law in Des Moines, IA. She is a member of the Iowa legal bar.

Prior to joining Diversified Brokerage Services (DBS) as their Business Development Director Terri was Vice President, Advanced Markets at Prudential Insurance Company of America, a position she held for ten years. In this role she was responsible for establishing the strategic direction of all marketing initiatives involving estate, business, executive benefits and retirement planning for Prudential's life insurance company. Prior to assuming this leadership position, Terri held various positions in the advanced marketing area with Prudential and other insurance carriers.

In addition to her extensive insurance carrier experience, early in Terri's career she helped establish a financial planning firm. During her tenure at the firm it was recognized by *Money* magazine as one of the most respected firms in the United States by legal and tax professionals.

Terri's expertise and ability to turn complex life insurance planning technique into understandable solutions has made her a well-known industry speaker and contributor to national financial publications. Terri has been a featured speaker at over a 1000 association meetings and is one of the few people to receive repeat speaking engagements at national association meetings.

Terri's belief in the value provided by knowledgeable, ethical financial service representatives has caused her to take an active role in several financial service professional organizations. She previously served on the national Board of Directors for the Society of Financial Service Professionals and was the recipient of its 2015 Kenneth Black Leadership award for exemplifying the organization's core value of education, ethics and relationships. Terri is also a member of AALU (Association of Advanced Life Underwriting) and NAEPC (National Association of Estate Planners and Councils) where she received the "distinguished" honor in 2010 for her contributions to the field of estate planning.