



John L. Olsen, CLU, ChFC, AEP is an insurance agent, estate planner, author, and educator, practicing in St. Louis County, Missouri.

He holds the Chartered Life Underwriter (1983) and the Chartered Financial Consultant (1985) designations from the American College. In 2004, he received the designation of “Accredited Estate Planner” (AEP) from the National Association of Estate Planners & Councils.

John joined the financial services industry in 1973. He has worked for several insurance companies as an insurance agent, sales manager, Agency Director of Training, and Regional Marketing and Sales Consultant. In 1987, John formed Olsen Financial Group, of which he remains President. In 2015, he closed Olsen & Marrion, LLC (as Jack Marrion, his partner, retired) and opened Olsen Annuity Education, a firm specializing in fee-only consultation and training on annuity and life insurance subjects. The website is www.olsenannuityeducation.com.

John has written and taught courses in insurance; financial, retirement and estate planning; and conducted seminars for agents, planners, and lay audiences. In addition to serving his own clients, John provides case consulting services to attorneys, accountants, insurance agents, and financial advisors, and provides expert witness services in litigation involving annuities and investment products. He is the immediate Past President of the Estate Planning Council of St. Louis, a Past President of the St. Louis chapter of the National Association of Insurance and Financial Advisors (NAIFA), and serves on the board of directors of the St. Louis chapter of the Society of Financial Services Professionals.

John has written dozens of articles on life insurance, annuities, planning software, and financial & estate planning topics, published in many industry journals and magazines and has been quoted many times in articles on annuities, life insurance, and retirement planning. In 2010, John was named to the Editorial Advisory Board of *Tax Facts*, a tax reference work widely respected and used in the financial services industry. He edited the questions relating to annuities in the 2016 edition.

John is co-author, with Michael E. Kitces, of *The Advisor’s Guide to Annuities* (4th. ed., National Underwriter Co., 2014), available on Amazon, with Jack Marrion, of *Index Annuities: A Suitable Approach* (Olsen & Marrion, 2011), available on Amazon, and is the author of *Taxation and Suitability of Annuities for the Professional Advisor* (2nd edition, 2014) an e-book available on amazon.com) and *John Olsen’s Guide to Annuities for the Consumer* (Olsen & Marrion, 2015), an e-book, available on Amazon.

John’s article, “*Annuities and Suitability: Reflections on the State of the Debate*”, appearing in the Nov, 2006 issue of the *Journal of Financial Service Professionals*, won the First Place prize in the 2006 Kenneth Black, Jr. Journal Author Award Program. In 2011, John was awarded the Paul S. Mills Scholarship by the Foundation for Financial Service Professionals, an award established to recognize the conferee’s demonstrated commitment to lifelong education, volunteerism, and ethical practice.

John is a sought-after speaker, having given presentations to chapters of the Financial Planning Association, the National Association of Insurance and Financial Advisors, and the Society of Financial Services Professionals, to several Estate Planning Councils, the Missouri Society of CPAs, the Southern California Tax & Estate Planning Forum, the American Academy of Estate Planning Attorneys, several national conventions of the Financial Planning Association, the national conventions and “Arizona Institute” of the Society of Financial Services Professionals, and the Heckerling Estate Planning Institute.

John lives in Kirkwood, Missouri with his wife, Katherine and a cat named Calpurrrnia. He enjoys teaching, writing, reading, classical music, cigars, and arguing almost anything. John is an adequate pistol shot, a decent folk guitarist, and a terrible golfer. He can be reached at: 131 Hollywood Lane / Kirkwood, MO 63122 / office phone: 314-909-8818 / FAX: 314-909-7912 / email: john@olsenannuityeducation.com.