

“AGELESS RESUME”

Atlanta, Georgia

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*Senior Underwriter/Marketing Underwriter
Field Underwriter/Surety Underwriter/Surety Branch Underwriter*

EXECUTIVE SUMMARY

Accomplished Senior Underwriter with 14 years of successful experience in commercial surety, fidelity, financial institution bonds, and fiduciary liability. Successful agency, broker and insurance company experience. Self-motivated; strong oral and written communicator with core competencies that include:

- Developing and enhancing broker/ agent/ customer relationships.
- Marketing and developing new bond and fiduciary liability business.
- Promoting specific products and cross selling products.
- Underwriting and turning-around non-compliant business.
- Creating systems to make business more efficient and profitable.
- Providing technical training and mentoring for junior underwriters.
- Serving as a consulting underwriting resource.

SELECTED ACCOMPLISHMENTS

Developing and enhancing broker and agency relationships • Marketing and developing new bond and liability business • Promoting specific products and serving as a consulting resource

- **Received management recognition and monetary award from XXX Insurance for creating a fiduciary cross selling campaign to sell a small business fiduciary liability policy to current ERISA bond holders. Designed and automated the cross selling process which many underwriters successfully adopted.**
- **Successfully brought in \$500,000 in new business for XXX Surety by reestablishing relationships with and providing excellent customer service for three under-served agents/brokers in New York.**
- **Named Product Champion for commercial crime products because of product expertise. Became the consulting resource for the Bond Center underwriters.**
- **Promoted by XXX Surety four times in five years from underwriting trainee to Underwriter III. Took on multiple new responsibilities and executed them successfully.**

Underwriting and turning around non-compliant business • Creating systems to make business more efficient and profitable

- **Turned around major non-compliant book of business (“do not write”, too little premium for class, and risks written on ineligible forms) by successfully evaluating and making necessary changes to policy terms to bring them into compliance by**

retiring the business. Effective communication preserved the majority of broker relationships.

- Introduced and developed a proprietary database at XXX Surety NYC office which tracked status of submissions activity, hit ratios, volume, etc. so that priorities could be identified.
- Increased workflow efficiency by 100%; revising workflow and procedures allowing the same number of staff to handle twice the volume. In 1994 the premium volume was \$3M. In 1998 the premium volume was \$6M with no support staff increase.

Providing Technical Training and Mentoring • Serving as Consulting Underwriting Resource

- **Provide technical training and mentoring for five junior underwriters at Hartford as well as making decisions on risks outside their \$250,000-\$500,000 authority level and restrictions.**
- Serve as consulting underwriting resource for Bond Center underwriters for commercial crime products.

PROFESSIONAL EXPERIENCE

The XXX Bond Center, Atlanta, GA

2001-to Date

Senior Underwriter

Underwrite commercial crime and commercial surety risk with aggregate limits of \$1M and less. Establish and enhance relationships with brokers/ agents/customers

XXX Bond, (formerly XXX Surety), New York, NY

1995-2001

Underwriter

Underwrote commercial crime and financial institution bonds with limits of up to \$25 million. Established and enhanced relationships with brokers/agents/ customers. Promoted from clerical unit supervisor to underwriter in 1996.

EDUCATION • CONTINUING EDUCATION • TECHNICAL SKILLS

Certificate of General Insurance, Insurance Institute of America

Insurance Classes: Principles of Suretyship • Commercial Crime and Financial Institutions, CPCU 8, Finance and Accounting

Business Administration Courses at: Georgia State University, Atlanta, GA,

DeKalb Community College, Clarkston, GA, Brevard Community College, Cocoa, FL

Seminars: Time Management • Supervision • Team Building • Seven Habits of Highly Effective People • Effective Communications and Human Relations

Technical Skills: Microsoft Office Suite • Word • Outlook • PowerPoint • Excel