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Summary:

Insurance is a promise to pay and a promise to provide professional service at the highest level. My career has been spent fulfilling the promises made by me, my colleagues and the insurance carriers who have formed relationships with my clients. My experience and training has enabled me to provide knowledgeable service which, over the course of my career, has been highly valuable and highly appreciated. It has enabled my business partners to earn a satisfactory return on the time and money invested in my hiring and training. I have always been one of the most productive providers of insurance brokerage and related professional services with respect to both the level of service provided and the revenues received as a result of my presence.

Experience:

September 2005 to August 2008—Marsh USA. Senior Vice President/Client Executive

Risk Management Responsibilities

- Advised clients on all risk financing and risk transfer areas
- Negotiated client service agreements and drafted changes to standard agreements
- Coordinated efforts of product specialists (i.e. property, casualty, executive risk, professional liability etc)

Claims and Litigation Support Responsibilities

- Experience negotiating computer software and hardware errors and omissions claims
- Experience interfacing with legal counsel handling personal injury claims for major California University

October 1997 to February 2005—Acordia, Inc. Executive Vice President. Managing Director for Southern California. Reported to Regional Managing Director.

Risk Management Responsibilities

- Overall Management Responsibility including budgeting, adherence to budget, staff retention and development, client relationships, carrier relationships
- Advised large clients on all phases of risk management
- Served as global service coordinator for Western region

Claims and Litigation Support Responsibilities

- Extensive experience with quality assurance and errors and omissions risk management.
- Depositions regarding producer's duty to client.
- Depositions regarding producer agreements and non-piracy agreements.
- Experience negotiating settlements of alleged producer errors and omissions.
- Jury trial regarding alleged producer errors and omissions.

January 1997 to September 1997—Aon Risk Services. Executive Vice President. Reported to Regional Vice President.

January 1989 to December 1996—Alexander & Alexander. Executive Vice President. Reported to Regional Vice President.

Risk Management Responsibilities

- Led client teams on two of largest accounts in office—negotiated insurance programs in global markets.
- Experience negotiating service agreements with clients.
- Experience writing and presenting stewardship reports to major clients.

Claims and Litigation Support Responsibilities

- Responsible for quality assurance and errors and omissions risk management on largest accounts in office.
- Served on committee to standardize “best practices” throughout company
- Negotiated major property and casualty claims involving manuscript forms with international underwriters

January 1984 to May 1989—Sedgwick Group. Senior Vice President. Reported to Regional Managing Vice-President.

Risk Management Responsibilities

- Manager of Risk Management Department. Also Account Executive on three major accounts.
- Experience writing and presenting stewardship reports to major clients.

Claims and Litigation Support Responsibilities

- Negotiated claims on manuscript property and liability insurance forms.

September 1975 to December 1983—Dinner Levison Company. Partner and Vice President. Reported to Senior Vice President in charge of Risk Management Department.

Risk Management Responsibilities

- Account executive on a number of major global clients. Placed insurance coverage in London, Zurich, Bermuda and US financial centers

Claims and Litigation Support Responsibilities

- Experience negotiating major claims on manuscript property and liability insurance forms.
- Assisted client in \$30 million property loss involving serious business interruption negotiations.
- Depositions regarding alleged producer errors and omissions.

Education:

University of California, Berkeley. AB Economics 1966
Attended University of San Francisco School of Law 1966-67
CPCU—1972
ARM—1976