

ROGER E. THOMAS

Condensed Curriculum Vitae

Specialized Exclusively in Insurance-related Matters since 1976



Qualifications include (present or past):

- ☆ Over 33 years of insurance experience, which includes owning and managing a successful, award-winning independent insurance agency for 16 years
- ☆ Agency Appraisals -- Over 140 insurance agency appraisals completed to date
Agency Sale, Merger, Acquisition or Dissolution activities -- Over 200 cases completed to date
- ☆ Chairperson of the committee and author of the definitive publication "Standards and Guidelines for Appraising Insurance Agencies", a project of the American Association of Insurance Management Consultants: 2002-2010
- ☆ Featured speaker at Asia Business Forum Bancassurance conference, Hong Kong, China: Sep 2004
Invited again to speak in Singapore in 2005 and Hong Kong in 2008, but unable to accept
- ☆ Three times featured at the Independent Insurance Agents of Texas annual conventions as the "Agency Valuation, Sales & Acquisitions" expert on the "Ask The Experts" program: 1997, 1999, 2003
- ☆ American Association of Insurance Management Consultants (AAIMCO)
National President: 1996-1998 Board of Directors: 1991-2000; 2002-2011
- ☆ CIC (Certified Insurance Counselor) professional designation (dormant)
MBA with a concentration in finance and investments (from SMU)
BBA in management, *cum laude* (University of Texas - Pan American)
- ☆ Articles published in national and regional insurance publications
- ☆ Extensive litigation experience as an expert consultant and as an expert witness
- ☆ Broad experience consulting with agents, bankers, attorneys and insurance companies about all matters relating to agency procedures, management and ownership

A complete Curriculum Vitae will be forwarded immediately upon your request.

THOMAS & THOMAS
AGENCY CONSULTANTS
AND APPRAISERS, INC.

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