

BIOGRAPHY

Lee M. Hoffman CIC, LIC, CPIA
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Experience in the Insurance Industry

Lee Hoffman has been an insurance professional since 1971 and has served in many capacities in the insurance and risk management sectors. He is well known within the industry and has authored articles on insurance coverage, claims, and related matters.

Mr. Hoffman is the owner of Lee M Hoffman & Associates, LLC, an insurance litigation, claims and enterprise risk management consulting firm. He holds the designations of Certified Insurance Counselor, Licensed Insurance Counselor, and Certified Professional Insurance Agent. Mr. Hoffman consults for attorneys on all types of contracts and has a two hour legal education seminar (CLE) on insurance and indemnification agreements. He is also a practicing risk manager and insurance educator with 1st Source Insurance of South Bend, Indiana, and teaches advanced insurance concepts to insurance agents.

Education

Indiana University

Insurance and Risk Management Licenses

Licensed Property and Casualty Insurance Agent and Consultant (Indiana Resident)
Licensed Life, Accident and Health Insurance Agent and Consultant (Indiana Resident)
Licensed Property and Casualty Insurance Agent (Michigan Non-Resident)
Licensed Property and Casualty Insurance Counselor (Michigan Non-Resident)

Other Licenses

Michigan Residential Builders' and M & A Contractors' Board Residential Builders License
Indiana Licensed Real Estate Sales Person (Referral)

Insurance and Risk Management Computer Systems/Software

Proficiency with Applied Software

Professional Designations and Accomplishments

President of the American Association of Insurance Management Consultants (AAIMCo).

Active member of the Society of Certified Insurance Counselors (CIC)

Active member of the Certified Professional Insurance Agents Society (CPIA)

Michigan Licensed Insurance Counselor (LIC)

Adjunct Professor Southwestern Michigan College – Construction Trades Division

Former member of the Independent Insurance Agents of Indiana and Independent Insurance Agents of America. (IIABA)

Former member of the Michigan Association of Property & Liability Insurance Counselors (MAPLIC)

Served on the Citizens/Hanover Insurance Co. Indiana Agents Advisory Council, Indiana & Michigan Agents Advisory Council and the Agency/Company Automation Advisory Council.

Publications

Published the *Insurance Advisory - For Attorneys*, a newsletter for attorneys about insurance issues as they relate to the practice of law.

Author of numerous articles on insurance as it relates to the practice of law. The following is a partial list.

1. "Keeping contracts from conflicting with coverage", American Agent & Broker Magazine, September, 1999
2. "Attorney's role in making sure client is properly insured", The Indiana Lawyer, VOL. 10 NO 22, February 2 – February 15, 2000
3. "Personal Injury' and other confusing words and phrases", Insurance Advisory - for Attorneys, April, 1999
4. "Leases and the landlords right of subrogation", Insurance Advisory - for Attorneys, October, 1999
5. "Indemnification and the purchase order agreement", Insurance Advisory - for Attorneys, July, 1999

Author and Lecturer of a Continuing Legal Education Seminar titled "Insurance and The Risk Transfer Process". The subject matter concerns insurance, indemnification and risk transfer agreements and their interoperability with insurance contracts.

Career

Lee M. Hoffman & Associates, LLC

South Bend, Indiana and Niles, Michigan

1997 to Present Owner/Managing Member - Insurance consulting, enterprise risk management consulting, and litigation support including case evaluation, strategy development and legal research.

Legal Support Services:

Litigation Consulting – case evaluation; testifying expert witness; consulting expert; dispute resolution; case research; agency/company contract negotiation, and dispute resolution.

Non-Litigation Consulting - merger and acquisition consulting; insurance and indemnification agreements; risk transfer agreements

Counsel:

Enterprise risk management consulting; Captive insurance feasibility studies including 831 (b) captive creation and utilization, policyholder advocacy, claim consulting and insurance coverage needs analysis; insurance coverage reviews; broker reviews, bid specifications and bid analysis.

2005 to Present Educator, advisor & technical assistant for commercial lines agents; conduct personal and commercial insurance C.E. classes on advanced insurance and risk management concepts; risk management consultant for commercial lines clients.

Lee M. Hoffman - Licensed Michigan Builder Niles, MI

1985 to Present Expertise in construction related insurance and risk management including construction contracts, safety and OSHA compliance. Constructed several homes including his current residence.

Hoffman Insurance Group, LLC Granger, Indiana

2002 to 2005 Owner - Retail insurance agency selling all forms of insurance and financial service products.

Independent Insurance Center of Petoskey Petoskey, Michigan

2001 Retained to manage and rehabilitate the agency so that it could be sold. Agency was sold in six months after being on the market for three years.

Taylor & Moyer Agency South Bend, Indiana

1971 to 1997 Executive Vice President/Shareholder, Insurance Agency selling all lines of insurance; sold commercial insurance and managed the commercial lines department including hiring and training commercial lines sales people.