**Casey Roberts, ACSR, AFIS, CIC**

**Principal, Laurus Insurance Consulting**

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**Professional Experience**

**2010 to Present Principal**

 **Laurus Insurance Consulting**

Providing consulting services to insurance agencies, insurance brokers, insurers and business owners. Educator and speaker on various insurance continuing education topics including: insurance agent’s & broker’s standard of care, agent’s & broker’s errors and omissions, ethics, risk management, workers’ compensation, commercial property and liability, business auto, garage, inland marine, umbrella & excess, employment practices, director’s & officer’s liability, professional liability, pollution liability, multiple agricultural and farm risk topics, various personal insurance coverages including auto and homeowner’s, sales and agency sales management. Mr. Roberts also teaches on behalf of various professional organizations and educators including: IRMI (International Risk Management Institute), Insurance Community University, Insurance Educational Association and Agency Management Resource Group. In addition he is a sought after speaker on multiple topics including Agent’s & Broker’s E & O, all things related to Farm/Agricultural Insurance and Ethics.

**1992 to 2010 National Instructor**

 **Insurance Skills Center/ IBA West**

As an instructor I have researched, written and/or presented continuing education classes on various topics including: personal auto and homeowners, workers’ compensation, general liability, commercial property, business auto, garage, umbrella & excess, inland marine, employment practices, director’s & officer’s liability, agents & broker’s errors and omissions, ethics, agent’s & broker’s standard of care, agency management, multiple farm and agricultural topics.

**2000 to 2010 Commercial Sales Manager & Producer**

 **NorthWest Insurance Agency, Inc.**

Served as commercial sales manager to an insurance agency/brokerage with some eight (8) locations and twenty four (24) commercial producers. In this role I also established and managed agency to carrier relationships as well as negotiated agency/carrier contracts and compensation. Implemented and coordinated sales and marketing plans while assisting and monitoring with coverage placements. Established and monitored agency sales processes and served as problem solving liaison between carriers and the agency.

**1994 to 2000 Commercial & Personal Lines Producer**

 **Bondi-Anderson & Associates**

Led the agency in four of six years in personal commercial insurance sales production. Sales included all commercial lines coverages as well as maintaining ongoing customer relations and retention. Prepared and marketed applications to various carriers, rated policies utilizing carriers’ rating systems, prepared proposals for review and approval by

customers.

**1992 to 1994 Commercial & Personal Lines Producer**

 **R. H. Durler & Sons Insurance**

 While serving as a commercial producer in this family owned agency I was responsible for personal commercial sales production. Sales included all commercial lines coverages as well as maintaining ongoing customer relations and retention. Prepared and marketed applications to various carriers, rated policies utilizing carriers’ rating systems, prepared proposals for review and approval by customers.

**1983 to 1992 Personal Lines Underwriter**

 **Personal Lines Manager**

 **Commercial Lines Producer**

 **George Petersen & Associates**

 Sales included all commercial lines and personal lines of coverage as well as maintaining ongoing customer relations and retention. Prepared and marketed applications to various carriers, rated policies utilizing carriers’ rating systems, prepared proposals for review and approval by customers. Managed relationships between agency and thirty three (33) separate homeowner’s associations in a retirement community in Santa Rosa, Ca.

 **1976 to 1982 Agent & District Manager**

 **Farmers Insurance Group**

 As a direct agent of Farmers Insurance Group I sold and serviced multiple lines of insurance to individual consumers and business owners. As district manager I assisted other agents in goal setting and achievement thereof including recruitment of new agents and their training.

**Professional Designations & Licenses**

1. California Agents/Brokers Property & Casualty License
2. Certified Insurance Counselor (CIC)

2000 Accredited Customer Service Representative (ACSR)

1. Agribusiness & Farm Insurance Specialist (AFIS)

CIC Course of Study:

 Commercial Property

 Commercial Casualty

 Personal Lines

 Agency Management

 Life & Health

**Professional References**

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 Laurie Infantino Insurance Community University

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