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DALE A. PHINNEY, CPCU

PROFILE

Seasoned Insurance Professional with extensive experience, education, and training seeking position in the insurance industry, focusing on all aspects of the business including, but not limited to Sales, Service, Marketing, Agency Management, Production, Commercial, Personal & Life Underwriting, Auditing and Loss Control.

PROFESSIONAL DESIGNATIONS

Chartered Property Casualty Underwriter (CPCU)
Associate in Commercial Underwriting (AU)
Associate in General Insurance (AINS)
STATE CPCU CHAPTER BOARD OF DIRECTORS
Treasurer, Secretary, and Vice President

PROFESSIONAL EXPERIENCE

Risk Management / Audits October 2013 - Present

PREFERRED REPORTS, H&S LOSS CONTROL INSPECTIONS

- Key responsibilities for Preferred is to act as a Quality Analyst - correct errors, make recommendations and approve or disapprove commercial surveys conducted in the field. Complete physical inspections for H & S Loss Control, primarily in Michigan and throughout the United States. Also, work as a virtual WC & GL auditor.

Remote Midwest Territory Manager March 2014 - November 2014

DOVETAIL INSURANCE

- Wrote 150 new Agency contracts in 8 months. Managed 25 Agency visits and 40 Agency phone calls weekly. Evaluated sales data. Closed deals. Assisted producers. Traveled extensively.

Remote Senior P&C Production Manager January 2010 - September 2012

THE FREMONT INSURANCE COMPANY

- Managed assigned territory. Doubled net written premium to \$5 million, with a 33% direct written loss ratio. Introduced new CPP rating software. Conducted training seminars. Developed and managed relationships.

Remote P&C Production Underwriter January 2009 - September 2009

THE GREATER NEW YORK INSURANCE COMPANY

- Increased net written premium by \$906,000. Solicited producers to new production territory. Created two way process with executives and home office staff.

Underwriter, Marketing & Inspection Representative, Commercial Auditor May 1985 - August 2008

AUTO OWNERS INSURANCE COMPANY

- Served as Underwriter (all lines and levels), Marketing Representative, Commercial Auditor, and Inspection Representative.

EDUCATION

CENTRAL MICHIGAN UNIVERSITY
Bachelor of Applied Arts

LANSING COMMUNITY COLLEGE
Associate of Applied Arts