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***Life Insurance thought leader. Former Fortune 250 senior executive.
Led a team of 1,000+ employees and administration for 200,000+ producers/agents.
Harvard Fellow. Experienced expert witness.***

PROFESSIONAL EXPERIENCE

INSURANCE CAPITAL CONSULTING, HARTFORD, CT

June 2022 – Present

President

Expert witness and consulting services comprised of a cross-functional team of seasoned insurance industry professionals with extensive experience in insurance company home office operations, covering the lifespan of a life insurance policy or annuity.

- Agent/producer/broker licensing, appointment, contracting, commissions, terminations
- Customer service and call center operations
- Administrative processes and systems
- Customer complaint resolution
- Compliance with federal regulatory requirements, state regulators, and other government agencies

AMERICAN SUPERCONDUCTOR CORPORATION (Nasdaq: AMSC), AYER, MA

June 2022 – Present

Board Member & Member of the Audit Committee

Headquartered near Boston, Massachusetts, with operations in Asia, Australia, Europe, and North America, AMSC solutions enhance the performance and reliability of power networks, increase the operational safety of navy fleets, and power gigawatts of renewable energy globally.

HARVARD UNIVERSITY, CAMBRIDGE, MA

January 2016 – present

Fellow, Advanced Leadership Initiative www.advancedleadership.harvard.edu

Multi-disciplinary fellowship designed to deploy a force of accomplished senior leaders to address the world's most challenging issues.

- Core curriculum facilitated by Harvard professors and world-renowned experts on a wide range of global issues including education, climate, healthcare, and social justice
- Supplemental curriculum at Harvard's Business School, Law School, Kennedy School, and Graduate School of Education
- Focus Area: public sector, philanthropic, and nonprofit leadership
- Ongoing engagement serving on Harvard's Advanced Leadership Coalition

LINCOLN FINANCIAL GROUP, HARTFORD, CT

1997 – April 2015

Senior Vice President (SVP), Partner Solutions for Life, Claims and Distribution (2012 - April 2015)

Senior leader for life insurance operations with responsibility for insurance and annuity claims, call center handling 1.25M calls annually, business and technology optimization, and licensing and compensation. Organization comprised of 1,000+ employees, administration of 220,000 distribution partners, \$65M+ annual department budget and \$35M strategic project budget; oversight for \$6.5B total annual disbursements.

- Site Leader for Hartford operations; Member of Corporate Leadership Group
- Created new operating model and leadership structure, including transformation agenda.
- Led multi-year, enterprise-wide initiatives; responsibility over four geographically dispersed operating locations.
- Oversight of customer service's operational adherence to Dodd-Frank regulations
- Championed a public/private initiative, in partnership with the President, University of Connecticut (UCONN), to deliver a career/financial literacy workshop for undergraduate and graduate students.

SVP, Producer Solutions & Strategic Initiatives (2009-2012); **Vice President, Producer Solutions & Strategic Initiatives** (2004–2009)

Led 350+ employees across 5 locations to ensure accurate and timely disbursement of \$1.7B in annual compensation for life and annuity lines of business. Provided Appointments, License Validation, Contracting, Marketing Agreements and Compensation for over 220,000 distribution partners across individual and employer-sponsored businesses.

- Developed vision and strategy to create one congruent, end-to-end producer experience, regardless of distribution channel, product, or market.
- Implemented operating model to deliver the strategy, including centralized Call Center to receive 210,000 calls annually. Streamlined processes and incorporated regulatory and financial controls.

Assistant Vice President, Strategy, Communications & Internal Consulting (2001-2003)

Directed communications and business development consulting for Life & Annuity businesses. Provided strategic and operational support to Chief Operations Officer.

- Drove industry-leading Affluent Women's Marketing Initiative. Partnered with National Association of Women Business Owners (NAWBO) to promote product solutions for Association members.
- Led *Value of Money*™ financial literacy initiative, partnering with Lincoln Financial Advisors in Chicago, IL; Washington, DC; Irvine, CA; and Cleveland, OH.

Director, Strategic Insights Group (2000-2001)

- Supported Chief Operations Officer in re-organization initiatives, including Underwriting Reinvention.
- Spearheaded communications, including introduction of the company's first-ever online newsletter.

Senior Business Strategist/Call Center Manager (1997-2000)

Implemented process improvements to minimize cost and improve service. Served as Project Leader for the integration of Life Insurance Customer Service post-CIGNA/AETNA mergers. Promoted from Client Service Consultant (1997).

- Successfully integrated customer service and back-office operations supporting 475,000 variable and fixed life insurance policies with no disruption in service.

CIGNA INDIVIDUAL INSURANCE, BLOOMFIELD, CT

1995 - 1997

Executive Assistant

- Provided Chief-of-Staff support to President, CIGNA Financial Advisors.

AMERICAN EMBASSY, BONN, GERMANY

1980 - 1990

Program Manager, Tactical Reconnaissance Program, US Air Force and other U.S. Government Agencies

- Established relationships with host government leaders.
- Managed technical resources for bi-lateral tactical reconnaissance initiative.
- Held U.S. Government clearance for Top Secret Sensitive Compartmentalized Information (TS-SCI).

OFFICE OF U.S. SENATOR ABRAHAM RIBICOFF, WASHINGTON, DC

1978-1980

Staff Assistant

- Began as Congressional Intern while a full-time student. In 1978, assumed position as full-time Staff Assistant.
- Managed constituent requests.

EDUCATION AND PROFESSIONAL DEVELOPMENT

Association of Insurance Compliance Professionals (AICP) Annual Conference	2024
Securities and Insurance Licensing Association (SILA) Annual Conference	2023
30 th Annual Expert Witness Conference	2023
Harvard University, Advanced Leadership Initiative	2016
Leadership Greater Hartford Leadership Summit	2010-2011
Lincoln Leadership Learning Forum	2001-2002
Women’s Campaign School at Yale	1998
The George Washington University, Slavic Studies	1977-1980

HONORS AND AFFILIATIONS

Member , Securities and Insurance Licensing Association (SILA)	2023 - present
Member , Association of Insurance Compliance Professionals (AICP)	2024 - present
Member , Association of Home Office Underwriters (AHOU)	2022 - present
Board Member , Avon Education Foundation, Avon, Connecticut	2023 - present
Member , Harvard Alumni Association of Northern Connecticut	2022 - present
Member , International Women’s Forum Connecticut	2018 - 2021
Laureate , Junior Achievement Business & Community Leader Hall of Fame	2015
Campaign Chair , Greater Hartford Arts Council	2014
Board Member , Insurance & Financial Services Consortium Hartford	2011 - 2015
Board Member , World Affairs Council – Connecticut	1997 - 2016
Board Member , Connecticut Science Center	2009 - 2016
Board Member , Teach for America – Connecticut	2012 - 2016
Board Member , Wadsworth Atheneum	2013 - 2016