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RD Global Inc
3303 W. Commercial Blvd. Suite 150
Fort Lauderdale, FL 33309

Dear Hiring Manager,

I am writing to express my sincere interest in the position of Insurance Licensing Administrator, and I am excited to bring my vast experience and skills to your team at RD Global Inc.

In my current role at Vault, I manage the agent licenses for our licensed insurance agency Vault Custom Risk Solutions and assist legal with the company agency licenses. I have demonstrated my skills in agent onboarding, licensing compliance, and serving as a primary point of contact with our contracted insurance agents. In my previous role as Global Producer Management Specialist at Starr Companies, I led a team focused on insurance licensing and platform development. I successfully managed the entire licensing, appointment, and contracting process to streamline workflows and increase efficiency for Starr's licensing department. I am proud of my prior roles in developing and maintaining a licensing process and platform. I bring a comprehensive understanding of insurance compliance, that I would be excited to bring to RD Global Inc.

With extensive experience in the insurance industry, I possess an in-depth knowledge of insurance licensing, including E&O, P&C, Surplus Lines, and Personal Lines, that I have effectively administered compliance across multiple states. I am highly skilled at maintaining various agency licensing databases, including systems such as NIPR, NAIC, Sircon, Rhoads (PCRM), and ProducerOne, ensuring accurate and up-to-date information for agencies and individual producers. I am dedicated to resolving licensing and compliance issues promptly. and have a proven track record of successfully handling mergers and acquisitions, ensuring accurate processing while working closely with agencies involved.

I have strong organizational skills in reporting and communications and can create and maintain high-level licensing compliance reports. I am skilled in effective communication with state departments of insurance and internal divisions, including Corporate Compliance, Legal, and Division leaders.

I am confident that my meticulous attention to detail, skills, and commitment to compliance excellence, make me an ideal candidate for this role.

I would welcome the opportunity to further discuss how my skills and experience align with your organization's needs. Thank you for considering my resume.

Sincerely,

Kristi Templin

Objective

Highly motivated and experienced professional in insurance compliance and licensing, seeking an opportunity to join a dynamic team and contribute to the company growth. Eager to bring strong organizational, analytical, and communication skills to the role of Insurance Licensing Administrator at RD Global Inc.

Education

- SCP - Paralegal Studies/Law (Current Student) – associate degree
- FL 2-20 Resident General Lines Licensed
- AINS 021 - Property and Liability Insurance Principles
- Previously held Series 7 and 31

Summary of Qualifications:

- Self-motivated, driven, and detail-oriented with strong organizational and interpersonal skills.
- Extensive experience in brokerage, life, health & annuity, and P&C insurance industries.
- Proven ability to deliver results with confidence, accountability, and a sense of urgency.
- Compliance and regulatory knowledge with a responsiveness to MCE regulators.

Program Experience:

Salesforce, NIPR, State Specific Sites, LexisNexis, Microsoft Word, Outlook, Excel, PowerPoint, Nuance, Adobe, FINRA, WebCRD, Criminal and Civil Research, Background Research.

Professional Experience

Licensing Coordinator & Surplus Lines Filing Analyst

Vault -Saint Petersburg, FL - 10/2019 – Current.

- Led agent onboarding and appointing processes, including termination of agencies, appointments, and agreements.
- Conducted in-depth research and analysis of state statutes for licensing and related agency requirements.
- Managed the review and processing of appointed agency mergers and acquisitions.
- Focused on maintaining strong vendor relationships related to licensing operations.
- Filed surplus lines premium taxes, surplus lines service or stamping office fees, and other fees.
- Demonstrated proficiency in overseeing licensing operations and financial compliance.

Account Manager

Mitchell Insurance Services - Saint Petersburg, FL - 03/2019 – 10/2019

- Processed new business, renewals, endorsements, and certificates of insurance for various clients.
- Provided accounting support through invoicing, QuickBooks, and agent commission reconciliation.
- Actively participated in industry workshops, seminars, and trade shows, representing the agency.
- Maintained relationships with insurance carriers.

Property & Casualty - Global Producer Management Specialist - Licensing

Starr Companies - Greater Los Angeles, CA - 06/2015 - 02/2019

- Developed and maintained licensing and appointments for domestic and global producers.
- Conducted routine supervision of interns and ensured compliance with US domestic state laws and international terms.
- Assisted project management in process improvements and development in multiple UAT environments.
- Successfully handled mergers and acquisitions while reviewing and responding to Market Conduct Exams.

Branch Licensing & New Business Coordinator

AXA Advisors, LLC - Tampa, FL (03/2010 - 06/2015)

- Processed new business related to life, annuity, and broker applications. Managed FINRA registrations, analyzed and processed initial FINRA U4 and U5, and handled updates and amendments.
- Liaised with underwriters, relationship managers, and corporate offices for recruiting and hiring.
- Oversaw new candidate hiring and onboarding, processing background checks, employee training, and contract validation.
- Served as Legal and Compliance Associate, ensuring adherence to company and regulatory guidelines.

Executive Investment Assistant - CPA and Financial Services

Cardinale Financial Group-HD Vest - Wesley Chapel, FL (09/2009 - 02/2010)

- Reviewed client portfolios, rebalanced investment products, and processed transfers across the financial industry. Maintained knowledge of fund companies, broker dealers, and life insurance and annuity products.
- Managed CE courses for all licensed employees to stay within compliance. Ensured compliance with CPA, CFP, insurance, FINRA, and Firm Element requirements.

Alternative Investments - Operations/Administration - Support Specialist III

Raymond James and Associates - St Petersburg, FL (05/2004 - 05/2008)

- Acted as a liaison to analysts and sales associates to understand the platform of products offered to high-net-worth clientele.
- Conducted subscriptions, transfers, and redemptions of various investment products, such as REITs, commodities, private placements, alternative mutual funds, private equities, and hedge funds.
- Reviewed individual client profiles to determine suitable percentage balance of high-risk products. Assisted in compliance with final reviews overstated guideline allocations.
- Developed and created automated processes using Access software to comply with Federal registration requirements of the National Futures Association