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Commercial Department Education Coordinator

Account Administrator

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Years at Present Firm: 11

Current role at CPCU Society:

President – Pacific Northwest Chapter

Website/Communications – Pacific Northwest Chapter & Professional Experience Resource Group

Certifications: CPCU (2013), ARM (2010)



A & B: How did you come to work in the insurance industry? My uncle hired me for his independent agency during the summer after high school to help him with odd office jobs and phone support. I worked part time through college in a small, retail brokerage. Once it was time to find a full-time job and start a career, I found myself with a bit of experience to leverage.

A & B: What is the most challenging aspect of your job? Office politics.

A & B: What aspect of your work as a broker do you find the most rewarding? When I'm wearing my "insurance professional hat", my job allows me to see who's-who and what's-what in my community. I live in an area of the country that is growing fast in response to the tech boom. Real estate deals and construction demands are heavily influencing the character and economy of the city. I feel more connected to my metro area and the Pacific Northwest because of the daily conversations I have with my clients about changing risks and exposures.

When I'm wearing my "Education Coordinator hat", I am passionate about providing educational opportunities, fostering connections amongst people, and championing all who bring value. I'm grateful to participate in developing careers of my coworkers in a variety of ways, many of which intersect perfectly with my CPCU Society involvement.

A & B: What emerging commercial risk most concerns you as a broker? Privacy liability. Etiquette with tech devices and sharing of information is still being worked out. Old expectations have and will continue to be put to the test in the digital age, and some of those tests very well may involve our clients. I expect this to remain a hot topic of conversation with our clients for some time.

A & B: What do you consider the most important short- and/or long-term issues facing the agent/broker community? The experience gap following the retirement wave of baby boomers is being felt today and will for some time. That problem hits at a time when technologies are dramatically influencing the patterns of human activity. It is hard to figure out how to plan for the future based on the past when the rate of change increases. What's clear is that we're behind the ball, but the insurance industry is not alone in this plight – our clients know the pain well. We must develop positive feedback loops between businesses, high schools, universities, and industry clubs to create the environment we need to survive collective upheaval. I love to see disparate businesses come together with an eye to the future.

A & B: When & why did you become a volunteer leader at the CPCU Society? My friend and fellow CPCU, Theresa Fabela, was my inspiration when she started to attend board meetings of the Pacific Northwest Chapter. I'd never thought about getting involved until she started to take on more responsibilities with the group. I figured that if it was worth it to her, why not me? I volunteered for service shortly after finishing my designation and have been involved ever since. Thank you, T!

A & B: Has your involvement in the CPCU Society helped your career? If yes, explain. Absolutely, yes. To start, I didn't feel like I personally owned my career until after I started to participate. Soon I was bringing industry insight and leadership skills back to my day job to the benefit of my clients and coworkers. Further, I've been able to represent my firm to the wide variety of insurance professionals attending any CPCU function. My passions for community networking, career development, and education can all shine within CPCU Society, and my company continues to entrust me with greater responsibility because of it.

A & B: What is your favorite book and/or movie?

Book: The Hitchhiker's Guide to the Galaxy series by Douglas Adams. The whole set of books. Watching the movie is fun but it doesn't count. I laughed myself to tears reading the books.

Movie: Alien.

A & B: What is the most unusual/interesting place you have ever visited? My friends and I came upon a volcanic beach on the Big Island of Hawai'i that boasted a naturally formed, seaside aquifer the perfect size and temperature for about 5 of us to sit in it. The water inside of the volcanic rock had been significantly desalinated. Only after that night did I find out aquifers are common around Kona. It made for a great surprise.

That same beach also hosted a family of donkey, which did not make for as fun of a surprise.

A & B: How do you balance the responsibilities of yourself, family, work and CPCU? Frequent maintenance of trust relationships is a great habit. Balance is a struggle, and sometimes you need help from and/or forgiveness of those around you.

A & B: What advice do you have for agents/brokers considering earning the CPCU Designation? Obtaining the designation is a phenomenal boost for any résumé, but I highly recommend you attend chapter/national sessions and be open to networking opportunities within CPCU Society. Coming together and sharing ideas with other professionals in different parts of the industry can help provide perspective about one's own career – perspective that you may not realize from interactions with coworkers and clients. Further, if you haven't heard about the resources available to Members like the Mentorship Program or the Knowledge Center, ask someone!

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