

## Bio

### Rip W. Curtis

CEBS

Disability Insurance Agent (Broker / Producer)



#### Responsibilities

Business development, primarily sourcing business from other insurance agents, employee benefits consultants and financial planners.

Needs assessments, to determine the nature of the exposure and quantify it as accurately as possible.

Risk assessments, to ensure that proposals are as accurate as possible.

Vendor selection and RFP management, to identify options in the marketplace based on buyer needs and priorities.

Coordinating new business requirements to implement new coverage.

Communications with group participants (as needed).

Servicing existing business, including facilitating transitions as individuals move between employers, maintaining adequate coverage relative to changing needs.

Monitoring coverage for policy lapses and replacements so that stakeholders with an interest in managing key-person risk remain protected over time.

#### Education

B.A., Finance; Michael G. Foster School of Business; University of Washington; 1992

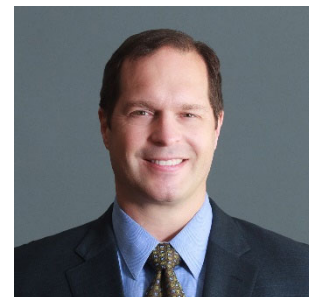
#### Professional Designations

Certified Employee Benefit Specialist (CEBS)

#### Experience

Rip has been in independent practice since 2002. Prior to that, he was a Producer with New England Financial, a MetLife company, in Seattle, Washington, since 1998.

He manages several dozen group accounts and has placed more than 1,000 individual policies through various carriers.



1420 5<sup>th</sup> Ave Ste 2200  
Seattle, WA 98101  
Tel (206) 652 2266  
ripcurtis@disabilityunderwriters.com

disabilityunderwriters.com  
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