

David Lombardi, CPC-A

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Career Summary

Over 15 years of experience in financial services/insurance industries, specifically small group insurance operations. Demonstrated in-depth experience in the operational process, from operations to underwriting support. Recognized by management and field staff for both production and quality achievements. Adept in different work environments.

Experience

Sun Life Financial

September 2007 – April 2010

Underwriting Assistant

Windsor, CT

For Small Group Operations, prepared quotes for on average 100 lines of coverage weekly for review by Risk Management/Underwriting and Field Personnel/Sales. Reviewed group census information along with industry factors to determine group eligibility. Produced manual rates for Basic Life, Optional Life, Short Term Disability, Long Term Disability and Dental coverage. Compared manual rates with renewal rates (if applicable).

- Effectively worked with regional customers throughout the United States ensuring excellent service and production; Received STAR award from regional office to acknowledge excellent teamwork and quality results.
- Consistent top producer in exceeding performance volume goals; for 2009 achieved 142% of production goal, in addition met all quality targets.
- Worked closely with sales coordinators and underwriting, in reviewing requests for quotes (RFQ's). Frequently suggested plan design strategies that integrated both customer needs and company requirements. Worked proactively as a team member to bring in every prospect possible from a risk perspective.

July 2005 - August 2007

New Business Analyst

Windsor, CT

For Small Group Operations, processed sold New Business cases submitted by the Field. Released 25 - 28 cases a week to activate new business coverage. Reviewed group application for completeness. Determined sold to formula ratio and verified whether the rates were within the Sales Rep's discretion. Coordinated with underwriting when necessary.

- Consistently achieved production and quality goals.

- Performed system IT testing utilizing Sun Life (IPS) processing system for new business, adding several critical riders to LTD product; functions allowed for greater system efficiency and alleviated the need for a manual certificate process.
- Worked effectively with numerous regional sales offices. Established productive relationships. Recognized by management. Recipient of quarterly service awards.

Genworth Financial

July 2002 - June 2005 *Eligibility Representative* Enfield, CT

For Small Group Operations, processed employee-level transactions for group accounts. Including employee additions/terminations, changes and salary/volume adjustments. In addition, fielded approximately 20 - 30 customer service calls daily from group policyholder administrators, group brokers and field staff.

- Recipient of numerous production and quality awards

Phoenix Companies/General Electric (GE acquired Phoenix Company's group division)

July 1995 - June 2002 *Billing/Collection Representative* Enfield, CT

Education

University of Massachusetts

May 1994 *Bachelor of Arts* Amherst, MA
 Fine Arts

Holyoke Community College

May 1989 *Associates* Holyoke, MA
 Retail Management

U.S. Career Institute

November 2011 *Certificate Program* Springfield, MA
 Medical Coding

American Academy of Professional Coders

Certification
 CPC-A