

# Jack Forgash

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## Executive Summary

Avid learner and naturally curious individual with a history of success in both organized and unstructured environments and an innate knack for problem-solving by understanding the root cause through careful disaggregation.

## Professional Experience

### **Senior Underwriter**, Zurich North America, *Boston, MA*

June 2019 – Present

- Quantify the risk of loss of a potential client using an Excel-based risk model to contemplate 5 to 10 years of actual loss performance, financial metrics, and more in a risk analysis.
- Decide, based on the calculated loss estimate and opinion formed, if the prospective firm's risk of loss is permissible and determine the appropriate pricing and program structure.
- Negotiate program terms and conditions with broker partners while balancing what is right for the customer, for Zurich, and what is possible to attain considering a competitive market.
- Develop relationships and actively manage accounts throughout the year by way of mid-year meetings with client leadership to solidify a business partnership with clients and brokers.
- In 2019 adapted to new measurement criteria that counted total portfolio, instead of only new business, by growing portfolio to \$12.5mm from \$10mm through new business wins and a 91% retention ratio.
- Increased efficiency by improving hit ratio from 20% in 2018 to 25% in 2019, above of the team average of 22%.
- Executed underwriting quality initiative, helping our team achieve the highest quality and compliance scores in the country across all business units.

### **Underwriter**

July 2017 – May 2019

- In 2018 added \$3.7mm in new business over a goal of \$3.1mm, while retaining 85% of accounts over a 76% goal, and managing a 35% increase in workflow over prior year.
- Awarded a Bronze Award in October 2018, which is granted in recognition of above and beyond contributions and achievements in the face of a complex challenge.
- Recognized with an "Outstanding" performance rating for the 2018 year.

### **Associate Underwriter**

June 2016 – June 2017

- Selected to one of twenty nationwide positions for the Underwriting Training Program and attended rigorous courses at the Schaumburg, IL headquarters for six weeks to learn necessary foundational skills to excel and achieve promotion to underwriter.

## Education

### **Self-Directed Study**

Fall 2019 – Present

- Developed independent curriculum in computer science to learn core fundamentals with a focus on Python for data exploration, analysis and visualization. See [jackforgash.com/office](http://jackforgash.com/office).

### **Graduate Certificate**, Harvard Extension School, *Cambridge, MA*

September 2017 – May 2019

- Topics: Financial Accounting, Managerial Accounting, Financial Analysis & Valuation

### **Bachelor of Arts**, Colgate University, *Hamilton, NY*

September 2012 – May 2016

- Major in Economics, Minor in Political Science & Member of Economics Honor Society

### Prior Experience

- Intern**, iPipeline, *Exton, PA* May 2015 – August 2015
- Financial Accounting intern on the FP&A Team at a Private Equity backed Insurtech company.
  - Quality checked select internal reporting under the guidance of analysts developing Pro-forma financial statements to close out the quarter.
- Intern**, Philadelphia Phillies, *Philadelphia, PA* May 2014 – August 2014
- Interacted directly with customers in the ticket sales office assisting purchases.
  - Volunteered for weekly outreach program at community centers in South Philadelphia.
- Caddie**, Waynesborough Country Club, *Paoli, PA* Summer 2008 – Summer 2013
- Developed a rapport and professional relationship with golf members and their guests.

### Community Involvement

- Volunteer**, Animal Rescue League of Boston March 2018 – April 2019
- Adoption Floor Volunteer working with the Canine Behavior Team.
- Volunteer**, Phillies Baseball Academy May 2014 – August 2014
- Directed tours of the ballpark several times per week for corporate events and for local youth teams involved in the Phillies Baseball Academy.
- Volunteer**, American Red Cross 2012 – 2016
- Blood drive volunteer and donor each semester.