RONALD C. MORSE

Stamford, CT • 203-559-1671 • ron@ronaldcmorse.com • linkedin.com/in/ronald-c-morse • **Portfolio:** ronaldcmorse.com/brewermorris

Case Manager | Client & Operations Specialist

Detail-driven professional with 20+ years of experience managing client relationships, operational workflows, and cross-functional projects in the insurance and financial-services sector. Licensed Life & Health Producer recognized for empathetic, solutions-focused client advocacy. Known for turning complex problems into structured, scalable solutions and bringing an entrepreneurial mindset to improving client experiences, processes, and business operations.

Core Competencies:

- Client Relationship Management
- Client Issue Resolution & Policy Support
- Risk Assessment & Due Diligence
- Financial & Policy Analysis
- Insurance & Regulatory Familiarity
- Reporting & Data Tracking
- CRM Platforms & Process Documentation
- Cross-Department Collaboration

Professional Experience:

Relation Insurance Services & Stamford Insurance Group **- Stamford, CT**

Operations Analyst / Business Support Specialist / Operations Manager / Insurance Agent

2000 – 2025

- Managed full case lifecycles for internal and external stakeholders; from intake and documentation through resolution; ensuring timely, compliant handling of sensitive matters.
- Liaised with clients, agents, and vendors to clarify coverage, resolve escalations, and deliver empathetic, practical solutions in time-sensitive situations.
- Created and maintained SOPs and CRM systems, improving accuracy and accountability.
- Supported finance and leadership teams with budgeting input, cost feasibility, and reporting for operational initiatives.
- Partnered with executives on client communications, research, and presentations, ensuring alignment between customer needs and company strategy.
- Brought an entrepreneurial, solutions-oriented approach to client and ops challenges; anticipating needs, streamlining processes, and identifying opportunities for improvement and growth.

Early Career – Insurance Agent (Personal & Commercial Lines)

- Provided direct customer service and policy guidance for personal auto, homeowners, and small-business coverage while assisting clients with life and health policy options.
- Built long-term client relationships through needs-based assessments, policy quotes, and coverage education, developing strong communication and regulatory-awareness skills.

Community Leadership & Engagement

President, Brighton Court Condo Association: Oversees property management, insurance coordination, and safety/resilience for a 37-unit community.

Tools and Systems:

Microsoft 365 (Excel, Access, PowerPoint, Teams) • CRM Platforms (Vertafore AMS360)
RingCentral UCaaS • SharePoint • Adobe Suite • Lucidchart • CAD Layout & Drafting

Education:

State University of New York – Purchase - *Conservatory of Theatre Arts, Design/Tech*

> *"Ronald wore many hats with expertise, enthusiasm, and dependability".*
>
> *— Brian Rogers, CEO, Stamford Insurance Group*