



**CITY OF POMPANO BEACH
ADVISORY BOARD / COMMITTEE
APPLICATION**

City Clerk's Office Phone: 954-786-4611 Fax: 954-786-4095
Post Office Drawer 1300, Pompano Beach, FL 33061
www.pompanobeachfl.gov

Mr. ___ Mrs. ___ Ms. ☒ Miss ___ Name: Rosemarie Puerto
(Optional)

Residence Information:

Home Address: 525 North Ocean Blvd Apt 1722
City/State/Zip: Pompano Beach FL 33062
Home Phone: - Cell Phone: (917) 686-4659
Email: rosepuerto@aol.com Fax: -

Business Information:

Employer/Business Name: Centurion Liability Insurance Services, LLC
Current Position / Occupation: Vice President / Ins. broker
Business Address: 1877 S. Federal Highway Suite 200
City/State/Zip: Boca Raton, FL 33432
Business Phone: (917) 686-4659 Fax: - Email: rpuerto@centurionliabilityins.com

Are you a U.S. Citizen? Yes ☒ No ___
Are you a resident of Pompano Beach? Yes ☒ No ___ Reside in District: 1 ___ 2 ___ 3 ___ 4 ___ 5 ___
Do you own real property in Pompano Beach? Yes ☒ No ___
Are you a registered voter? Yes ☒ No ___
Have you ever been convicted of a felony? Yes ___ No ☒
Current or prior service on governmental boards and/or committees: Zoning Board - West New York, NJ (May 2013 to October 2015)

Please make a check next to the Advisory Boards/Committees you would like to serve on:

| | | |
|---|--|---|
| <input type="checkbox"/> Affordable Housing | <input type="checkbox"/> Cultural Arts | <input type="checkbox"/> Parks and Recreation |
| <input type="checkbox"/> Air Park | <input checked="" type="checkbox"/> <u>Education</u> | <input type="checkbox"/> *Planning & Zoning/Local Planning Agency |
| <input type="checkbox"/> Architectural Appearance | <input type="checkbox"/> Emergency Medical Services | <input type="checkbox"/> *Police & Firefighter's Retirement System |
| <input type="checkbox"/> Nuisance Abatement Board | <input type="checkbox"/> *Employee's Board of Appeals | <input type="checkbox"/> Pompano Beach Economic Development Council |
| <input type="checkbox"/> Charter Amendment | <input type="checkbox"/> Employee's Health Insurance | <input type="checkbox"/> Public Art Committee |
| <input type="checkbox"/> Community Appearance | <input type="checkbox"/> *General Employee's Retirement System | <input type="checkbox"/> Recycling & Solid Waste |
| <input type="checkbox"/> *Community Development (CDAC) | <input type="checkbox"/> Golf | <input type="checkbox"/> Sand & Spurs Riding Stables |
| <input type="checkbox"/> CRA East | <input type="checkbox"/> Historic Preservation | <input type="checkbox"/> Marine |
| <input type="checkbox"/> CRA West | <input type="checkbox"/> *Housing Authority of Pompano Beach | <input type="checkbox"/> *Unsafe Structures |
| <input type="checkbox"/> Local Complete Count (Temporary) | | <input type="checkbox"/> *Zoning Board of Appeals |

***Financial Disclosure Form is required, if appointed to serve, upon appointment and upon resignation/retirement.**

In addition a Resume may be attached

Education: Bachelor of Science in Economics from St. Peter's College, Jersey City ; Master of Arts in Education from New York University (included student teaching in NYC grade 1 & grade 4/5 (The latter in charter school))

Experience: Please see attached resume. "Education" experience includes: student teaching (portfolio available upon request); fitness training & education; insurance career related mentoring, webexes, trainings on products

Past Positions: In NJ, served on Zoning Board

Hobbies: Reading, jogging, community advocacy (goal → to discover what would most benefit our kids — eg. A community center? a reading program?)

Making any false statements herein may be cause for revocation by the City Commission of any appointment to a Board/Committee.

Signature: Rosemarie Puerto

Date: 2/20/2021

Initials of Clerk or Deputy: _____

Date received or confirmed: _____

Please check one: ☒ New Application ☐ Currently Serving on Board ☐ Updated Information

Note: Application is effective for one year from date of completion. If you have any questions on the above, please call the City Clerk's Office at: 954-786-4611, or send via fax to: 954-786-4095.

Summary

Insurance industry professional with extensive product knowledge and cross-functional experience. Diverse background working with various Professional and Management Liability lines of coverage. Exceptionally successful in developing and maintaining client and colleague relationships, networking, presenting, communication, organization and mentoring. Experience with Client Advisory, Placements, Claims handling, Underwriting, Team Supervision, and RFPs.

Professional Experience

Centurion Liability Insurance Services, LLC – Wholesale Brokerage, Boca Raton, FL August 2018 to Present
Vice President

Producer, placement and advisory services for clients. Consulting services to assist and support Retail Broker clients place specialty lines of insurance coverage they are unfamiliar with. I create marketing information, conduct training sessions for retail broker staff, and manage client educational calls to assist clients understand the specialty lines insurance products.

Aon Risk Solutions – Healthcare Practice, Miami, FL
Vice President

2017 to 2018

Placement and advisory services for clients in the health care industry. Participate in due diligence process with M&A group on new business; support Producer and team on projects and work on renewal strategy documents and proposals to clients, all of which include loss analysis and coordination with actuarial group and London colleagues. Lines of coverage include Healthcare Professional and General Liability, Regulatory Liability, and ancillary products.

Lockton Companies, LLC, New York, NY
Vice President

2012 – 2017

Management of private-company account portfolio comprised of 160 clients (primarily private equity owned) and generating revenue of \$2mm. Supervision and development of team for maximum efficiency and effectiveness to market and service accounts.

- Participate in RFP process and pro-active client prospecting to generate new business
- Provide complete servicing to clients, including advisory services, placement of coverage, and claims advocacy
- Coordinate and work effectively with M&A Project Managers, Producers, Client Executives, and Consultants in fast paced environment to address client needs
- Lines of coverage include D&O, EPL, Fidelity, Media E&O, Cyber, Fiduciary and Lawyers
- Creation, planning and coordination of Lockton sponsored seminars for clients and industry colleagues
- Professional and tactful negotiation and persuasion skills to achieve objectives
- Recruitment and management of staff, personnel evaluations, oversight of expense accounts and workflow allocation

Marsh & McLennan, Inc., New York, NY
Senior Vice President

2001 – 2012

Management Liability specialist with expertise in Professional Liability (including Cyber and Media Liability), Director & Officer Liability, Employment Practices Liability, Kidnap & Ransom Coverage, Fiduciary Liability and Fidelity lines of coverage. Responsible for managing Large and Middle Market client portfolios including Fortune 1000 accounts.

- Identified exposures and developed professional and management liability insurance programs for new prospects and existing clients
- Tapped to oversee, provide guidance to, and collaborate with junior brokers on difficult placements and client meetings
- Implemented formal mentoring program within department to align with corporate objectives
- Recruited to join National Broking team to expand book of business and improve support and training to field offices, Client Managers, and placement specialists
- Spearheaded trainings for a major client for the purpose of expanding their E&O and Cyber liability coverage lines among their subsidiaries

Chubb & Son Inc., Guaynabo, Puerto Rico**2000 - 2001****Diversified Financial / Executive Risk Underwriter**

Managed the Financial and Professional book of business for Chubb Puerto Rico profitably expanding the portfolio in line with overall company guidelines.

- Trained junior staff on products and underwriting analysis
- Prepared and implemented negotiation training Puerto Rico and Venezuela offices

Travelers Insurance Company, New York, NY**1998 - 2000****Underwriter**

Analyzed and evaluated Commercial lines of business for addition to the book of business, according to company guidelines.

- Underwriting entailed review of corporate and financial data, annual reports, and 5500s
- Developed relationship with brokers to increase sales

C.N.A. (formerly Continental Insurance Company) New York, NY**1992 - 1996****Senior Underwriter, Healthcare**

Underwrote accounts as well as providing underwriting and training support to field offices.

- Developed and carried out marketing of products and cross selling with other divisions and field offices
- Authority level up to \$10,000,000 granted
- Appointed specialist for Healthcare related accounts working closely with Healthcare division

American International Group, Inc. New York, NY**1986 - 1992****Claims Examiner / Underwriter**

Dual role focusing on supervising, training and developing team examiners, and monitoring large exposure cases principally as respects Financial Services sector.

- Settled and negotiated cases with insureds, counsel and brokers
- Underwrote Bank Directors & Officers and Bank Errors & Omissions insurance products
- Supervised excess and surplus lines facility for difficult to place risks through American International Surplus Lines Agency

Education, Professional Development and Training

Master of Arts Education, New York University - New York, NY

Bachelor of Science Economics, St. Peter's College - Jersey City, NJ

The Landmark Forum, Landmark Education – New York, NY

Creativity and Personal Mastery Course, Columbia University Alumni Association

Proctor Gallagher Institute – Fourth Dimensional Leadership seminar

Proctor Gallagher Institute – Paradigm Shift seminar

Other Interests & Skill Sets

Bi-lingual English / Spanish

Physical fitness and mental health advocacy, reading, psychology, surfing and community advocacy

Former Board Member - Coalition to Preserve the Palisades Cliffs

Former Commissioner to the West New York, NJ Zoning Board of Adjustments (May 2013 to October 2015)

Catholic Big Brother Big Sister Program NYC