

Mary A. LaPorte, AINS, CPCU, CIC, LIC, CPIA

Curriculum Vitae



Areas of Expertise:

1. Operations consulting in the areas of workflow and procedures with strong expertise in Independent Agency operations
 - ◆ Developing effective workflows and procedures
 - ◆ Creating meaningful agency standards
 - ◆ Providing action plans to facilitate the implementation of recommendations
 - ◆ Developing audit processes to assure compliance and support quality control
2. Agency Errors and Omissions (E&O) reviews and exposure identification in the retail and wholesale insurance agencies
 - ◆ Recommended by many of the largest E&O insurers in the country
 - ◆ Performing E&O audits in retail and wholesale agencies
 - ◆ Providing agents with detailed reports including suggestions/recommendations and resources for following best practices in agencies
3. Serves as an expert witness or consultant for Errors and Omissions litigation including:
 - ◆ Insurance agent's standard of care
 - ◆ Insurance agency operations
4. Education provider for a large array of insurance topics
 - ◆ Serving on the national faculty of CIC (Certified Insurance Counselors)
 - ◆ Current faculty for the CPIA (Certified Professional Insurance Agent) program
 - ◆ Former faculty for the CISR (Certified Insurance Service Representative) program
 - ◆ Qualified instructor for "A Practical Guide to Agency E&O Risk Management" program sponsored by the Independent Insurance Agents of America
 - ◆ Teaching E&O classes country-wide, for large convention groups and smaller in-house agency venues
 - ◆ Teaching a variety of Continuing Education Programs approved by the State of Michigan Insurance Department and for many other states
5. Has published a variety of insurance industry articles over the last twenty years
 - ◆ Writes a nationally recognized column entitled "E&O Q&A" which is published in a variety of insurance association magazines. This column answers insurance agents' questions related to best practices and E&O avoidance in the insurance agency environment.
6. Author of ***Mission: EXCELLENCE – Creating an Internal E&O Loss Control Program*** and ***Mission: EXCELLENCE – Agency Errors and Omissions Checklist***. These publications outline simple steps to follow in measuring E&O exposure and establishing an internal loss control program to minimize Errors and Omissions claims.

Experience:

1. Over 30 years with a large Midwest independent insurance agency
 - ◆ Personal Lines Manager, Excess and Surplus Lines Manager, Claims Manager
 - ◆ Errors and Omissions Coordinator
 - ◆ Agency principal
2. An independent consultant since 2001, working with insurance professionals to attain excellence through sound business practices and advanced education:
 - ◆ Insurance agency operations consulting
 - ◆ Errors and Omissions loss control
 - ◆ Ethics and insurance management education
 - ◆ Policy and coverage education
3. A member of the national faculty for the Society of CIC for over 20 years, teaching classes for:
 - ◆ Agency as an Organization
 - ◆ Managing and Sustaining Financial Strength
 - ◆ Human Resources
 - ◆ Agency Productivity and Effectiveness
 - ◆ Legal and Ethical Responsibilities
 - ◆ Personal Auto, Homeowners, and Condominiums, Personal Umbrella
 - ◆ Other advanced education topics
4. Faculty with the Big "I" Virtual University "Ask the Expert" service to members of the Independent Insurance Agents and Brokers of America
5. Secretary of AAIMCo (American Association of Insurance Management Consultants)
 - ◆ AAIMCo is the only organization in the U.S. that focuses exclusively on insurance management consulting
 - ◆ Only those who meet specific criteria can be approved for membership in the organization

Designations, Licenses, Honors:

- ◆ Licensed Property and Casualty agent in the state of Michigan for 40+ years
- ◆ Licensed Insurance Counselor (LIC) in the state of Michigan
- ◆ Attained General Insurance Certificate (INS 21, INS 22, INS 23) The Institutes - 1975
- ◆ Certified Insurance Counselor (CIC) since 1993
- ◆ Chartered Property and Casualty Underwriter (CPCU) since 1987
- ◆ Aschom Insurance Education Award - 1996
- ◆ Certified Professional Insurance Agent (CPIA) since 2011
- ◆ Associate in General Insurance (AINS) attained in 2017
- ◆ Inducted into the Michigan Insurance Hall of Fame in 2020

Mary A. LaPorte, CPCU, CIC, LIC, CPIA, AINS

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