

Jordan Fields

Insurance Analyst

Insurance analyst with 4 years in commercial property and casualty insurance, now supporting 6 underwriters on a \$90M book of small business policies. Analyzes loss ratios and exposure data in Microsoft Excel, writes renewal summaries and PowerPoint reports, and handles 40 agent questions a week with prompt customer service.

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Experience

Insurance Analyst 05/2023 - Present

Charter Oak Casualty Group Hartford, CT

Commercial insurance carrier writing \$1.2B in premium through 2,000 independent agents.

- Analyze loss ratios, exposure and rate change for a **\$90M** small business book, flagging 70 accounts a quarter for review.
- Build renewal summaries in Microsoft Excel and Microsoft Word for 6 underwriters, covering 250 policies a month.
- Respond to 40 agent and policyholder questions a week through Outlook and phone, resolving 90% within one business day.
- Present quarterly loss trend reports in PowerPoint to the regional underwriting manager and 3 product leads.

Underwriting Assistant 07/2021 - 04/2023

Farmington Valley Insurance Agency Farmington, CT

Independent agency placing commercial insurance with 12 carriers.

- Processed 60 policy endorsements and certificates a week for commercial auto, property and liability clients.
- Entered applications and quotes for 5 carriers, keeping submission errors under 2% in agency reviews.
- Compiled loss runs and prior policy data for 30 renewal submissions a month, sent 60 days before expiration.
- Resolved 15 client billing and coverage questions a day with clear, patient customer service.

Certificates

Associate in General Insurance (AINS) 10/2022

The Institutes

Property and Casualty Producer License 09/2021

Connecticut Insurance Department

Skills

Microsoft Excel

Microsoft Word

Outlook

PowerPoint

Loss Ratio Analysis

Commercial Insurance

Policy Rating

Underwriting Support

Customer Service

Detail-Oriented

Education

Bachelor of Arts

05/2021

University of Connecticut

Storrs, CT

Economics