

Joann P Mattson

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My passion is to use both my home office and life brokerage experience to move the life insurance industry forward for the next generation. This industry needs automation, data standards, and streamlined workflows between trading partners. By finding and applying more efficient technologies and improving the overall sales experience for both the agent and customer, we can attract younger talent and grow the industry while protecting the hard-earned assets of those we serve.

My knowledge of the life insurance industry is extensive and involves retail sales, administration, and technology from retail agent, home office, and brokerage general agent viewpoints. As my associates know, there is not one job in brokerage that I have not done at one time or another, and that experience has given me a great respect for those in this industry and a very valuable perspective.

EXPERIENCE

Nov 2018 – June 2023

VP, Strategy & Business Consulting – Highland Capital Brokerage

Responsible for leading projects tied to Highland's digital strategy as well as the overarching strategic initiatives impacting the life and annuity channels. Troubleshoot interdepartmental friction points and lead business process improvement endeavors. Lead Highland's Field Operations Unit. Manage both facility and vendor related implementation projects.

Nov 1993 – Nov 2018

VP, Administration – Four Seasons Financial Group Inc

Manage and oversee operations at FSFG. Specifically responsible for all aspects of licensing & contracting, new business and commission workflows, reporting, technology and overall process management.

Four Seasons Financial Group was acquired by Highland Capital Brokerage in November of 2018.

BACKGROUND

Education, License, Certification

Fellow, Life Management Institute (FLMI) – Life Office Management Association
Associate (AALU) – Academy of Life Underwriting
Certificate, Customer Experience Program – Seton Hall University

Licensed - Life, Health, Annuity Agent
Previous: Series, 6, 63

Volunteer

Advisory Board Member, Customer Experience Program – Seton Hall University