

Joann P Mattson

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My passion is to use both my carrier and brokerage experience to move the life insurance industry forward for the next generation. We need 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 sales, operations, administration, and technology from both carrier and distribution viewpoints. There is not one job in brokerage that I have not handled at one time or another. That experience has given me a great respect for those in this industry and a valuable perspective to help mentor the next generation.

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.

Sep 1990 – Nov 1993

Marketing Representative – Legend Insurance Agency (wholly owned subsidiary of United Pacific Life)

Worked in call center handling product illustration requests, coordinating carrier contracting, and assisting with new business submissions. Developed internal workflows to handle key hand-off points and increase communication between operational areas.

Legend (and its parent, United Pacific Life) were acquired by GE Capital in April of 1993.

Sep 1984 – Sep 1990

Administrative Coordinator – United Pacific Life

Provided Administrative support in Marketing Department before moving over to Actuarial Department. Passed Life/Annuity insurance licensing course and obtained life insurance license in state of Pennsylvania.

Legend (and its parent, United Pacific Life) were acquired by GE Capital in April of 1990.

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

ACCOMPLISHMENTS

- NAILBA – Technology Committee Chair (2003-2008)
- Life Brokerage Distribution Committee (LDTC) - Founder / Steering Committee Member (2008 – present)
- Highland University Platform (2022) - created online curriculum to level set industry and company knowledge for new and existing employees
- Highland Field Operations Unit (2022-2023) - developed KPIs and related reporting to manage and prioritize workloads, reduce departmental budget strain, and increase customer satisfaction. Introduced automation in key areas to reduce overhead needs.