

JIM FERRELL

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PROFESSIONAL SUMMARY

Product Owner for annuity and life-insurance platforms used by Financial Advisors and clients. Owned the FireLight and Aplifi platforms across new business order entry, forms and rules, suitability-adjacent and supervisory review, policy servicing, and post-issue work. Partnered with Sales, Distributor and Carrier clients, Operations, Technology, Legal/Compliance, Risk, and third-party vendors to write requirements, prioritize an Agile backlog, coordinate development and testing, and take capabilities from concept through production. Digitizes manual field processes and treats data accuracy as a downstream-control problem. Contributor to ACORD annuity data standards used across order-entry platforms.

CORE COMPETENCIES

Annuity & Life Insurance Products and Workflows • New Business Order Entry • Suitability & Supervisory Review • Policy Servicing & Post-Issue • Agile Product Owner / Squad Support • Jira Backlog & User Stories • Requirements, UAT & Production Rollout • Process Digitization • Risk, Issue & Dependency Tracking • Third-Party Partner Coordination

SELECTED IMPACT

- Executive owner of both the FireLight and Aplifi order entry platforms. Building out product and firm rules, review workflows, subpay, and post-issue servicing.
- Grew the FireLight platform from a product concept into an independent market leading platform.
- Published 15+ industry articles, industry interviews, and delivered content for annual client conferences (at both Apifi and FireLight), focused on annuity product technology, standards, and best practices supporting advisor and carrier success.
- Directed weekly independent carrier and distributor product requirements gathering conference calls for both Aplifi and FireLight, ultimately leading to product update delivery cadence and client sign off.
- Product Owner for an Agile engineering squad: Jira backlog, user stories, acceptance criteria, testing coordination, and production rollout.
- Reengineered paper and exception-heavy annuity workflows into digital order entry with controls that protected downstream operations and compliance.
- Led ACORD PPfA / XtBML design, and led the development of DTCC-to-ACORD mapping work used as the contract between field-originated business and administration.
- Tracked integration and delivery risks across DTCC, carriers, distributors, and engineering; escalated before go-live.

PROFESSIONAL EXPERIENCE

Business Owner / Operator — Process Digitization

Nov 2024 – Present

Villa Jenna • Delray Beach, FL

- Configured platforms and vendor workflows; documented ownership and exception paths so operational work stayed accurate and supportable.

Principal Consultant — Lead Business Analyst, Annuity Platforms

Oct 2021 – Apr 2023

Norima Consulting • Cetera Financial engagement (Remote)

- Lead consultant for an enterprise annuity program review: surveyed how Life and Annuity data and transactions moved across 4 unique distributors from sales, administration, order entry, compliance and downstream reporting.
- Documented data gaps, feed dependencies, and future-state requirements; wrote acceptance criteria.
- Partnered with Product, Operations, Compliance, and Technology to prioritize platform and data-integrity work.
- Built a scored evaluation of order-entry platforms geared specifically for Cetera's needs with a scoring output for senior decision-makers.

SVP / Product Owner — Agile Squad, Annuity Platform

Sep 2016 – May 2020

Annexus Ventures • Scottsdale, AZ (Remote)

- Product Owner for a new DOL compliant, advisor-facing annuity sales, onboarding, and supervisory-review platform; owned the Jira backlog for an Agile (Scrum) squad.
- Wrote business requirements, user stories, and acceptance criteria identified thru interpretation of looming DOL labor rule; coordinated offshore development and UAT from concept through production.
- Worked with executive owners to identify, evaluate multiple build vs buy options.
- Digitized manual sales and review steps onto DTCC enabled and connected workflows; tracked risks and dependencies across partners.
- Prioritized competing work so the offshore squad stayed on field-usable order-entry and compliance requirements build outs.

VP, Product Manager / Product Owner — FireLight Jun 2011 – Sep 2016

Hexure (formerly Insurance Technologies) • Remote

- Product Owner for the platform Financial Advisors used for annuity new business order entry, forms/rules, review, policy servicing, and post-issue transactions.
- Defined requirements with business and technology; prioritized enhancements; coordinated QA/UAT with carriers, distributors, Legal/Compliance-adjacent reviewers, and engineering.
- Reengineered application and servicing processes to reduce manual touch and strengthen controls before submission and after issue.
- Managed all third-party partners (DTCC, DST, ACORD, client IT); identified, tracked, and escalated feed and workflow risks.

VP, Product Manager — Aplifi Annuity & Insurance Platform

Jul 2002 – Jun 2011

iPipeline (Blue Frog Solutions) • Pompano Beach, FL

- Executive owner of Aplifi platform defining roadmap and delivery for a brand new digital annuity new business, compliance review, and partner data exchange.
- Led DTCC-to-ACORD mapping and PPfA product-data standards used as the contract between upstream sources and downstream processors.
- Ran the industries only PPfA xml generation tool for carriers for loading into the AnnuityNet platform prior to the ideation of the Aplifi platform.
- Ran standing field forums that turned data and process defects into prioritized backlog items.

DOMAIN & METHODS

Workflows: New business order entry, product and firm rules, suitability-adjacent and supervisory review, policy servicing, subpay, post-issue

Agile PO: Jira backlog, user stories, acceptance criteria, squad coordination, UAT, production rollout, risk/issue/dependency tracking

Data Standards: DTCC (all file formats), DST, ACORD PPfA / DPfA / XtBML / APP-SUB expert, carrier and distributor IT consumption of data

Analysis: SQL for output review, advanced Excel, process mapping, senior-management documentation