



## **Maurice Lieberman, CLU, ChFC, RHU, LUTCF**

### **LIEBERMAN FINANCIAL, INSURANCE, & CONSULTING SERVICES**

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#### **AREAS OF EXPERTISE**

Annuities

Broker Standard of Care

Insurance Agency

Insurance Agent & Broker

Insurance Contracts

Insurance Coverage

Insurance Disputes-Sales Practices & Bad Faith

Life Insurance

Life/Health Claims

Life/Health/Accident Insurance

#### **EMPLOYMENT**

##### **Lieberman Financial, Insurance, & Consulting Services, 5/1990-Present**

Self employed as a financial planner and expert witness; specializing in life insurance litigation, statistical analysis, and coverage disputes. 2003 Allianz Masters Forum Gold Club Qualifier. MDRT level producer.

##### **New England Financial Group, Life Insurance Sales Regional Director of the Western States, 5/2002-5/2003**

Worked with 22 agency offices assisting them in advanced concept sales, plan design, and agent training. Created innovative systems that are still in use throughout the Company.

##### **CSAA Life Sales Manager, 8/1998-4/2000**

Built market from scratch to produce in excess of \$1,000,000 annual life premiums within a three year period. President's Circle Qualifier for 2 consecutive years.

##### **Farmers Insurance Group Life Specialist, 3/1996-8/1998**

Top Life Producer in the district and the region. Trained several P&C producers to sell life insurance and earn Top Club Status.

##### **Allstate Life Specialist, 3/1994-6/1996**

Honor Ring Qualifier/Top Specialist in the region. Million Dollar Round Table Qualifier 1996. Recruited by Farmer.

##### **Principal Financial Group Brokerage Life Consultant, 1990-3/1994**

Management Round Table Qualifier 1991, 1992, & 1993. Built San Francisco Brokerage Operation in the Career Life Agency by appointing over 450 brokers in a five year period.

##### **Aetna Life Producer/Development Specialist, 1980-1984 & 1988-1990**

Top 5 Brokerage Representatives in the United States (San Francisco)

#### **EDUCATION**

Bachelor of Arts, U.S. History (Cum Laude); Ca. State University, East Bay. Hayward, Ca.

Associate in Arts, CSU Transfer Studies (Honors); Diablo Valley College, Pleasant Hill, Ca.

#### **PROFESSIONAL DESIGNATIONS AND MEMBERSHIPS**

Chartered Life Underwriter (CLU)

Chartered Financial Consultant (ChFC)

Registered Health Underwriter (RHU)

Life Underwriter Training Council

Fellow (LUTCF)

Certified Forensic Litigation Consultant (CFLC)

California Life & Disability Agent and Fire and Casualty Brokers' License

Member of Society of Financial Service Professionals

Forensic Expert Witness Association