



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 (FEWA)

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

Member of Society of Financial Service Professionals

Member of the American College of Forensic Examiners International.

Forensic Expert Witness Association