



Joaquin Hollis

Underwriting Assistant

Underwriting assistant with 2 years of experience processing agent referrals, generating risk reports, and preparing reinsurance placement summaries in commercial insurance settings. Earned a 98.09% compliance audit score by cross-referencing every submission against carrier underwriting guidelines and ISO underwriting rules before forwarding to senior underwriters. Proficient in Microsoft Excel and Insly for policy documentation, loss run analysis, and financial statement review.

CONTACT INFORMATION



(218) 555-0118



joaquin.hollis@example.com



Fergus Falls, MN
12345

KEY SKILLS

- ISO Underwriting Rules
- Carrier Underwriting Guidelines
- Microsoft Excel
- Insly
- Risk Assessment
- Loss Run Analysis
- Policy Documentation
- State Insurance Regulations
- Financial Statement Review
- Reinsurance Referral Processing

PROFESSIONAL EXPERIENCE

Underwriting Assistant | Otter Tail Basin Insurance Group, Fergus Falls, MN
2025 - Present

- Earned a 98.09% compliance audit score by cross-referencing every submission against carrier underwriting guidelines and ISO underwriting rules before forwarding to senior underwriters.
- Process 27 referrals per week from agents, collecting loss runs, applications, and inspection reports within 2 days of receipt.
- Generate 14 risk reports weekly in Excel summarizing exposure data, claims history, and financial ratios for the underwriting team.
- Decline excessive risks by flagging applicants whose loss frequency or financial standing falls outside carrier appetite, averaging 6 declinations per month.
- Authorize reinsurance referrals on policies where total insured values exceed \$455,700, preparing treaty placement summaries for the lead underwriter.

Insurance Administrative Assistant | Prairie Lake Casualty Partners, Alexandria, MN
2024 - 2025

- Organized and indexed 83 policy files per month in Insly, reducing document retrieval time from 11 minutes to 3 minutes per request.
- Compiled risk data from public records, inspection firms, and applicant questionnaires to support 19 referrals per week.
- Generated 8 risk reports weekly for senior underwriters by consolidating property inspection summaries, loss histories, and financial data into standardized Excel templates.

EDUCATION

BS in Finance

Minnesota State University Moorhead, Moorhead, MN | 2020 - 2024