

# Sheryl J. Moore

## Work experience

2005 - Present      Wink, Inc.      Des Moines, Iowa

### **President and CEO**

- Head of consulting firm that is the only resource in the nation that has product specifications and rates for all indexed life and annuities on the market, in addition to many that are no longer available for sale; much of the information is promoted on our insurance carrier, broker, and agent-based websites, AnnuitySpecs.com and LifeSpecs.com
- Work with insurance carriers state insurance regulators to foster education on indexed annuity and indexed life products
- Currently provide consulting services to 15 different insurance carriers in the indexed annuity and indexed life markets in product development, marketing, competitive intelligence, research, and training
- Publisher of the industry's most reputable, and longest-running indexed sales survey; the quarterly *AnnuitySpecs.com's Index Sales & Market Report*

2004 - 2005      Principal Financial Group      Des Moines, Iowa

### **Annuity Product Manager**

- Assist with final development of indexed annuity and develop and implement training programs on product for proprietary field force
- Pull competitors' indexed, fixed, and variable annuity policy filings from state insurance department to analyze product offerings
- Assist indexed, fixed, and variable product development efforts and rate setting on monthly basis
- Analyze and communicate sales and product trends to home office and sales personnel on a monthly basis

2002 - 2004      AmerUs Group      Des Moines, Iowa

### **Market Research Analyst**

- Pull competitors' indexed annuity and indexed life policy filings from state insurance department to analyze product offerings
- Assist indexed annuity and indexed life product development efforts and rate setting on monthly basis
- Develop and implement training programs on indexed annuity and indexed life products for recruiting of new marketing organizations and agencies
- Analyze and communicate sales and product trends to home office and sales personnel on a monthly basis

2001 - 2002 AmerUs Life Des Moines, Iowa

**Software Development Specialist**

- Develop and maintain life and annuity illustration software
- Develop and maintain agent extranet site; provide troubleshooting and navigation assistance to users
- Lead/facilitate various technical projects such as the conversion of the illustration system and the integration of a single illustration system for the AmerUs Group companies
- Develop and implement indexed life and annuity product training programs for field agents and Home Office personnel

1999 - 2001 AmerUs Life Des Moines, Iowa

**Telephone Customer Service Trainer**

- Train all new inforce phone representatives on technical and procedural issues
- Develop and maintain training program for telephone representatives
- Lead/facilitate projects that affect inforce customer service representatives
- Act as a resource for all other Home Office personnel

**Education**

2008 - 2010 Grand View University Des Moines, Iowa

**Political Science/Pre-Law**

- Graduated Summa Cum Laude with a BA in Political Science/Pre-Law

1994 - 1996 Graceland University Lamoni, Iowa

**Psychology/Sociology**

- Pursued BA in Psychology and Sociology

1993 - 1994 U. of Northern Iowa Cedar Falls, Iowa

**Marketing**

- Pursued BA in Marketing

**Accreditations**

Life Office Management Association designations earned as follows:

2003- Associate, Customer Service

2004- Associate, Insurance Regulatory Compliance

2005- Associate, Insurance Agency Administration

2011- Associate, Life Management Institute

**Publications**

- Co-author of *The Encyclopedia to Indexed Products: Annuity and Life*
- Author of the monthly competitive intelligence newsletter on indexed annuity and life products, "Moore Market Intelligence"
- Published over 100 articles on indexed annuity and indexed life products and sales in the following trade journals and news media since May of 2005:

*Allstate Financial's The Edge*

*Agent Sales Journal*

*Annuity News*

*Best's Review*

*BestWire*

*Broker World*

*Cyber Insurance News*

*The Des Moines Business Record*

*The Des Moines Register*

*InsuranceBroadcasting*

*InsuranceNewsNet*

*InsuranceNewsNet Magazine*

*Investment News*

*Life Insurance Selling*

*National Underwriter*

*The New York Times*

*Senior Market Advisor*

*Wall Street Journal*

## **Awards and Recognition**

- 2012 High Forensic Skill as an Orator, Buckley School of Public Speaking

## **Community Involvement**

- 2009 – 2012 Financial Plus Credit Union Member of the Board
- 2012 – Present Society for Annuity Facts and Education Member of the Board
- 2011 – 2012 National Association of Fixed Annuities Education Committee