

ELISE LOPEZ-MILLER

INSURANCE & RISK MANAGEMENT

CONTACT



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Washington, D.C.



<https://bit.ly/3D0xnN3>

EDUCATION

BACHELOR OF BUSINESS ADMINISTRATION – FINANCE / RISK MANAGEMENT & INSURANCE

University of Central
Oklahoma

ASSOCIATE OF SCIENCE – BUSINESS/MANAGEMENT & ACCOUNTING

Oklahoma City Community
College

State Licenses / District of Columbia

Property & Casualty

2011 - Present

Life, Health & Accident

2015 - Present

EXPERTISE

Customer Service

Project Management

Risk Management

Salesforce

Time Management

WORK EXPERIENCE

Internal Audit – SOX

Walker and Dunlop / 04/2023 - Current

Provides support to the Internal Audit Manager in the performance of the Company's annual Internal Audit and SOX compliance testing

- Perform risk assessments, document financial processes and perform tests of controls for the Company's Sarbanes-Oxley (SOX) program
- Collaborates with process owners to document key controls and significant processes changes.
- Supports special projects around internal control and process improvements; and other projects as assigned

Assist external auditors in their review and testing of controls and financial audit areas

- Documents or updates annual walk-throughs, narratives and flowcharts of business process documentation based on interviews with auditees for identified key internal controls
- Document processes, participate in developing first drafts of issues, reports, and other deliverables.

Insurance Analyst

Walker and Dunlop / 06/2020 – 04/2023

Provided technical support and insurance analysis for an average of 50 commercial loans each month

- Assisted borrowers in acquiring appropriate coverage while informing and educating them on their exposure, coverage, and exclusions
- Ensured that insurance was compliant with Fannie Mae and Freddie Mac regulatory requirements
- Provided technical support to Production, Underwriting, and Closing staff while conducting formal evaluations of risk

Assisted in training new hires

- Created training manual and guides for team
- Managed new hire while training on department processes

Conflict Resolution

- Worked with multiple 3rd parties for the lenders and borrower along with internal teams on how to problem solve insurance coverage issues within a loan
- Processed insurance waivers and exceptions with supporting documentation for non-compliant insurance issues

Co-developed Mentor program through Women of Walker & Dunlop (WoWD) by collaborating with HR and executives

- Successfully paired 50+ mentors and mentees, creating new connections, and encouraging employee retention

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INSURANCE & RISK MANAGEMENT

SKILLS

Microsoft Office

Public Speaking

Crucial Conversations

Critical Thinking

Adaptability

INTERESTS

Volunteering

REFERENCES

SHAUN FRIESEN
CLAIMS SUPERVISOR

CSAA IG

405.753.8045

Shaun.friesen@csaa.com

WORK EXPERIENCE CONTINUED

Automobile Claims Intern

CSAA IG / 05/2019 - 12/2019

Collaborated with colleagues to manage simple automobile claims by working directly with clients to investigate and evaluate the claim activity

- Prepared and maintained periodic reports pertinent for department metrics
- Reports created were used to analyze data, trends, and potential issues for claim audits and presented to management
- Identified opportunities to improve client and internal team processes

Sales Representative, Marketing

American Fidelity Assurance Company / 06/2017 - 04/2019

Assisted various customer types in understanding and maintaining current policies

- Conserved \$128,464 in premiums on average each month
- Sold 95% more new policies than the department average each month
- Averaged 31% greater calls above department requirement each month

Collected, organized, and merged sensitive data and internal notes for three departments

- Educated field staff on proper protocol and implementation of department-specific applications
- Assisted with revision of position descriptions and recommendations for management

Served on a cross functional Lean 6 Sigma project for 6 months

- Drafted and standardized rules for how multiple departments accept and document credit card
- Conducted testing and troubleshooting of the newly created system during the initial phase of the implementation

Studied under the Assistant to the Vice President of Customer Relations during a 6-month mentorship program

- Gained better understanding of why specific products are offered to markets
- Clarified the nature of the relationship between conversations and customer relations

Insurance Producer

State Farm Insurance Companies, John Mercer / 06/2011 - 06/2017

Designated team member responsible for servicing over 400 clients

- Resolved billing errors and issues, and communicated potential client risk to agent
- Prepared cross-marketing quotes while servicing existing accounts submitted renewals to underwriting

Administrative duties to the agent included:

- Responsible for general administrative activities for the office such as scheduling luncheons, meetings, and conferences