



## CHARLOTTE BOARDMAN

### PERSONAL DETAILS

**Chartered Insurer**  
**BSc (Hons) Mathematics for Finance and Management**  
**ACII**

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**Email:** c.boardman@facetuw.com

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### CAREER

#### **Binding Authorities Consultant, The Channel Managing Agency, London** **June 2016 – August 2016**

- Conducted a detailed functional review of the Managing Agency's Coverholder and TPA Audit functions identifying areas for improvement and development and providing recommendations to enhance the processes.
  - Staff training provided on Coverholder Audit function.
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#### **Binding Authorities Consultant, Barbican Managing Agency, London** **March 2015 – April 2016**

- Coordination of Coverholder Audits and development of the 2015 and 2016 Audit Plans
- Analysis of Coverholder Audit Reports
- Development of Management Information reporting with regard to Coverholder Audits

**In addition:**

- Interim Binding Authority Manager to cover gap in management cover (Jun – Sep 2015)
  - Coverholder applications and approvals
  - Liaison with Lloyd's for minimum standards review
  - Handover to new manager
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#### **Senior Binding Authorities Operational Coordinator, Tokio Marine Kiln, London** **2011-2013**

- Supervision of the assignment of audits in accordance with the Company Audit Policy
- Annual review and reappointment of Coverholder Auditors
- Analysis and monitoring of performance of external Coverholder Auditors
- Analysis of Coverholder Audit Reports
- Exception and management reporting
- Production of Board and Committee reports in respect of delegated authority
- Handling the design, amendment and updating of business processes and systems
- Preparation of policies and procedures
- Representing Tokio Marine Kiln in market meetings and projects with regard to delegated authority
- Staff Training

**In addition:**

- Interim Binding Authority Manager to cover 8 week sabbatical
- Approval of Coverholder Audit invoices and counter signatory in respect of bordereaux and endorsements

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## **Binding Authorities Analyst and Jewellers Block Underwriter, Tokio Marine Kiln, London 2003 - 2011**

- Management of 500+ binding authorities in all classes of business
- Coordination and analysis of Coverholder Audits
- Development and management of binding authorities database
- Management reporting
- Broker accreditation

### **In addition:**

- Underwriter of UK Jewellers Block insurance (2003-2005) - Individually registered Underwriter at Lloyd's of London
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## **Underwriting Assistant, Greenwich Managing Agency, London 1999 - 2003**

- Direct support to class underwriter in all underwriting matters including entering slips, endorsements and aggregates
  - Gained underwriting authority for worldwide commercial and personal property and jewellers block
  - Set up the syndicate's Binder management system
  - Coordinated Coverholder Audits
  - Key member of the Binder Monitoring Group
  - Management reporting including preparation of statistics and underwriting results
  - Credit control
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## **Commercial Insurance Trainee, Independent Insurance Company, London 1999**

- Processing of insurance policies - underwriting and premium.
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## **Lloyd's International Insurance Technician/Broker, Byas Mosley, London 1996 - 1999**

- Technician with broker duties handling Extended Warranty and related products.
  - Processing of premium and claims bordereaux
  - Premium and claims broking to Lloyd's and Company Market
  - Preparation of presentations to Underwriters and clients
  - Reconciliation of accounts
  - Calculation of RITC (Reinsurance to Close) figures and reports
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## **EDUCATION**

- 1991-1995** BSc (Hons) Mathematics for Finance and Management, University of Portsmouth  
**1989-1991** A Levels (4), Queen Mary's High School for Girls, Walsall  
**1984-1989** GCSE (9), Queen Mary's High School for Girls, Walsall
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## **Professional Memberships**

- Chartered Insurer** Chartered Insurance Institute  
**ACII** Associate Member of the Chartered Insurance Institute
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## **Professional Qualifications**

- 2015** Chartered Insurer, Chartered Insurance Institute (CII)  
**2004** Advanced Diploma in Insurance (ACII), Chartered Insurance Institute (CII)  
**2003** Registered Underwriter (R J Kiln), Lloyd's of London  
**2003** Certificate in Information Technology for Insurance Professionals (CITIP), (CII)  
**2001** Certificate of Insurance Practice, Chartered Insurance Institute (CII)  
**1998** Insurance Foundation Certificate, Chartered Insurance Institute (CII)  
**1997** Lloyd's Introductory Test, Chartered Insurance Institute (CII) & Lloyd's of London
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## **Technology**

Microsoft Office, IRIS, Eclipse, OpenBox, OpenXposure, CLASS, BDX, ATLAS, BARS (Superuser)