

## NATIONAL CATHOLIC SERVICES, LLC POSITION DESCRIPTION

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| <b><u>TITLE</u></b>                | <b>Director of Insurance Policy Services</b>  |
| <b><u>MAJOR RESPONSIBILITY</u></b> | Administrates Underwriting Services Provided by the Company   |
| <b><u>TITLE OF SUPERVISOR</u></b>  | Vice President of Claims and Underwriting   |
| <b><u>LOCATION</u></b>             | Chicago Area (Lisle, Illinois) Office or Employee's Remote Work Location  |
| <b><u>PRIMARY FUNCTIONS</u></b>    | <ol style="list-style-type: none"><li>1. Serves as the Company's technical underwriting focal point and resource for underwriting services provided by the Company and deliverable to the Company's shareholders and brokers.</li><li>2. Analyzes data compiled by the Company's third-party underwriting processing vendor and provides recommendations on terms and conditions to be offered for new and renewal business to the Vice President of Claims and Underwriting.</li><li>3. Coordinates and serves as a liaison for functions, data development and delivery to reinsurance providers for the Company's reinsurance program(s).</li><li>4. Comprehends, tracks and manages functions provided by the Company's underwriting processing vendor.</li><li>5. Coordinates and tracks changes in the wording of insurance policies issued by the Company. Analyzes and makes recommendations to changes in policy wording supported by outside counsel.</li><li>6. Works with the Vice President of Claims and Underwriting to formulate and implement underwriting objectives and strategies.</li><li>7. Masters the use of the Company's Underwriting Processing System as provided to the Company by the Company's underwriting processing vendor.</li><li>8. Communicates with shareholders, brokers, auditors, regulators and others regarding the Company's online underwriting resources.</li><li>9. Supports the Vice President of Claims and Underwriting in discussions with the Company's appointed actuary for functions related to insurance policy rating.</li><li>10. Supervises the Company's underwriting processing vendor for the timely issuance of insurance policy documents and oversees the maintenance of current and historical insurance policies.</li><li>11. Completes Underwriting Quality Checklist for each new and renewed policy.</li></ol> |

12. Prepares various underwriting reports to the Vice President of Claims and Underwriting as needed.
13. Works with the Company's controller to prepare the Company's Confidential Offering Memorandum, Joinder and Participation Agreements in connection with the acquisition of new shareholders.
14. Meets in person with Vice President of Claims and Underwriting, the underwriting processing vendor, shareholders, brokers, prospects and other staff as needed.
15. Other duties as assigned.

### **POSITION REQUIREMENTS**

1. Five years of experience as an underwriter at an excess liability insurance company, commercial insurance broker, reinsurer, surplus lines broker or managing general underwriter.
2. A thorough understanding of commercial excess liability concepts, practices, policy wording forms and interaction with other primary and excess liability insurance programs. Has knowledge and/or previous experience in alternative risk financing vehicles such as wholly owned captives, group captives and risk retention groups.
3. Experience with reinsurance concepts, reinsurance products, the measurement of the effectiveness of reinsurance programs and reinsurance treaty renewal processes.
4. Previous experience working with Commercial Insurance Underwriting Software Systems and/or Broker or Agency Management Software Systems.
5. Proficient with Microsoft Excel, Word, Outlook, and PowerPoint.
6. Ability to communicate clearly and effectively in English.
7. Possesses analytical skills and has the ability to work independently and provide recommendations and decisions in support of the Primary Functions
8. Ability to prioritize tasks and work under tight timeline constraints.
9. Ability to travel regularly in support of the Primary Functions and commute to the Company's offices regularly if the position is based at the employee's remote work location.
10. Strong interpersonal skills and ability to work well with clients, brokers, reinsurers and peers in a team environment.

Please note: The National Catholic Risk Retention Group, Inc. is a non-profit organization owned by entities of the Roman Catholic Church. Its mission and organizational goals reflect values of the Roman Catholic religion.

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