

CBIZ Special Risk Directory

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Debbie Thompson	Human Resources Director <i>CBIZ B & I Services, Inc. Human Resources</i>	<ul style="list-style-type: none"> • Talent and performance management • HR Questions, Comments, and Concerns 	(858) 795-2040 phone dthompson@cbiz.com
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Emily Reilly	Executive Assistant <i>CBIZ Special Risk</i>	<ul style="list-style-type: none"> • Executive Assistant to Timothy Moynihan 	(858) 444-3102 phone (858) 444-3157 fax ereilly@cbiz.com
Erin Bossemeyer	Supervisor of Producer Services <i>CBIZ Special Risk Producer Services</i>	<ul style="list-style-type: none"> • Supervise the direction of & create/revise process for licensing, contracting, commissions, and POS. 	(858) 444-3138 phone (858) 444-3157 fax ebossemeyer@cbiz.com
Eugene Robles	Case Manager <i>CBIZ Special Risk New Business</i>	<ul style="list-style-type: none"> • Case status inquiries. <i>Please ensure Eugene is assigned to your case before contacting.</i> 	(858) 444-3146 phone (858) 444-3157 fax erobles@cbiz.com
Glen Coral	Director, Advanced Planning <i>CBIZ Wealth Management Advance Planning</i>	<ul style="list-style-type: none"> • Advanced Illustrations & Case Design Resource 	(610) 862-2236 phone (610) 862-2536 fax gcoral@cbiz.com
Jeff Wolfle	PA Case Manager-Underwriter <i>CBIZ Special Risk New Business & Underwriting</i>	<ul style="list-style-type: none"> • Case status inquiries for CBIZ PA Office. <i>Please ensure Jeff is assigned to your case before contacting.</i> 	(858) 444-3108 phone jwolfle@cbiz.com
Jocelyn Ong	POS Assistant Case Manager <i>CBIZ Special Risk Policy Service</i>	<ul style="list-style-type: none"> • Your Policy Service General Resource 	(858) 444-3168 phone (858) 444-3157 fax jong@cbiz.com
John Louis-Barrow	Business Analyst & Carrier Relationship Manager <i>CBIZ Wealth Management</i>	<ul style="list-style-type: none"> • Business and financial analysis, technical testing. • Develop and manage carrier relations. 	(858) 444-3106 phone (858) 444-3157 fax jbarrow@cbiz.com
Karen Saunders	Controller CBIZ Wealth Management	<ul style="list-style-type: none"> • Business and Financial Compliance. • Develop and manage financial control. 	(858) 444-3101 ksaunders@cbiz.com
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Kryn Shutler	Production Associate <i>CBIZ Special Risk Production</i>	<ul style="list-style-type: none"> Incoming / outgoing mail, case initial processing (informals) 	(858) 444-3130 phone (858) 444-3157 fax kshutler@cbiz.com
Leah Tripp	Case Manager <i>CBIZ Special Risk New Business</i>	<ul style="list-style-type: none"> Case status inquiries. <i>Please ensure Leah is assigned to your case before contacting.</i> 	(858) 444-3131 phone (858) 444-3157 fax ltrip@cbiz.com
Loreta Mendigo	Licensing & Contracting Coordinator <i>CBIZ Special Risk Producer Services</i>	<ul style="list-style-type: none"> Your Licensing and Contracting resource 	(858) 444-3116 phone (858) 444-3157 fax lmendigo@cbiz.com
Marcus Garcia	Commission Associate <i>CBIZ Special Risk Producer Services</i>	<ul style="list-style-type: none"> Your Commission Accounting Resource 	(858) 444-3150 phone (858) 444-3157 fax mgarcia@cbiz.com
Marilynn Ono	Report Analyst <i>CBIZ Special Risk Operations</i>	<ul style="list-style-type: none"> Smart Office reports, office purchases. 	(858) 444-3152 phone (858) 444-3157 fax mono@cbiz.com
Matt Leighton	Marketing Manager <i>CBIZ Wealth Management Marketing</i>	<ul style="list-style-type: none"> Create and implement marketing direction for CBIZ Special Risk. 	(858) 444-3100 phone (858) 444-3157 fax mleighton@cbiz.com
Michael "Woody" Wodchis	Vice President, National Business Development <i>CBIZ Wealth Management</i>	<ul style="list-style-type: none"> Advocate for Wealth Management Consultants relative to strategies, tools and resources to develop revenue 	(858)444-3134 phone mwodchis@cbiz.com
Monica Dockman	Supervisor of New Business <i>CBIZ Special Risk New Business</i>	<ul style="list-style-type: none"> Contact for case questions comments and concerns. Contact for new business process inquiries. 	(858) 444-3124 phone (858) 444-3157 fax mdockman@cbiz.com
Nathan Dorn	NMFN Relationship Manager <i>CBIZ Special Risk Client Relationships</i>	<ul style="list-style-type: none"> <u>Northwestern Mutual</u> Life Relationship Manager and resource 	(858) 444-3160 phone (858) 444-3157 fax ndorn@cbiz.com
Nick Bonomi	Project Manager <i>CBIZ Special Risk Operations</i>	<ul style="list-style-type: none"> Smart Office, Paper Clip and all system related updates / upgrades / CBIZ SR daily operations/Phones 	(858) 444-3114 phone (858) 444-3157 fax nbonomi@cbiz.com
Paula Silva	Case Manager <i>CBIZ Special Risk New Business</i>	<ul style="list-style-type: none"> Case status inquiries. <i>Please ensure Paula is assigned to your case before contacting.</i> 	(858) 444-3149 phone (858) 444-3157 fax psilva@cbiz.com
Rachel Bruce	Business Development Manager <i>CBIZ Special Risk Business Development</i>	<ul style="list-style-type: none"> Strategic direction and management of the Independent New Business development. 	(858) 444-3175 phone (858) 444-3157 fax rbruce@cbiz.com
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Shayne Toby	Director of Operations & New Business <i>CBIZ Insurance Solutions</i>	<ul style="list-style-type: none"> Special Risk Management, Structure and Operations 	(858)444-3100 phone (858)444-3157 fax stoby@cbiz.com
Socorro Camas	Accounting Coordinator <i>CBIZ Special Risk Accounting</i>	<ul style="list-style-type: none"> General Accounting responsibilities, accounts receivable, payable, reimbursements, budget, GL 	(858) 444-3142 phone (858) 444-3157 fax Scamas@cbiz.com
Tammy Salyers	POS Case Manager <i>CBIZ Special Risk Policy Service</i>	<ul style="list-style-type: none"> Policy Service Case Manager and General Resource 	(858) 444-3132 phone (858) 444-3157 fax tsalyers@cbiz.com

Timothy Moynihan	President <i>CBIZ Insurance Solutions</i>	• Executive Decision-maker of Management & All Operations	(858) 444-3118 phone (858) 795-8609 fax tmoynihn@cbiz.com
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