

Phone • email

Peter Anderson

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Address • LinkedIn [Tools for Transition](#) [Sample Resume](#)  
**Estate Manager**

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*Confidential Company* • 2011 – Present

*Boutique consulting firm delivering integrated wealth management services  
to ultra-high-net-worth individuals, families and multi-family offices*

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Single-handedly created the Risk Management Practice nationwide for the Multi-Family Office division that became a significant contributor to the company's overall revenue. Identified and captured lucrative opportunities to build a profitable line of business by using a unique combination of skills, knowledge and experience. Built trust through proactive partnering and responsive communication. Provided direct account management for many of the most complex programs for the Family Office division.

Conducted discovery and prepared Personal Risk Management reviews for high-net-worth and ultra-high-net-worth individuals with a full spectrum of complex insurance and risk management needs. Served as point person for more than 60 clients with as many as 20 management programs each. Concurrently conducted business development to secure new and referral clients.

Developed materials and designed client processes including questionnaires, annual reviews and report analysis. Created formal client presentations around their risk management needs, solutions and performance.

#### **Selected Collaborations**

Architects	Claims Adjusters	Marine / Aviation Representatives
Attorneys	Estate / Tenant Managers	Relocation Supervisors
Board of Directors	Family Offices	Real Estate Agents
C-Suite Executives	General Contractors	Specialty Schools
CPAs	Healthcare Regulatory Compliance	Sports Venues

#### **Business Risk Management**

- Obtained commercial coverages for small businesses, employer groups, startup companies, nonprofit foundations and 501(c)(3) entities. Coverages included corporate suites at major sports venues, general liability, umbrella, Directors and Officers (D&O), and Errors and Omissions (E&O).
- Negotiated policy terms and managed claims.
- Acquired coverages for a documentary film company from startup through showing at a major film festival, including worldwide distribution contracts.

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**Human Resources Management Services**

- Supported clients' domestic and international employee groups. Performed international background checks and drafted employment contracts, confidentiality agreements and termination agreements.
- Established group benefits, workers' comp policies and employment practices liability insurance (EPLI).
- Set up specialized international yacht crew medical and benefit plans.
- Obtained individual coverages for clients, their families and their employees.
- Acquired coverages for specialty schools for handicapped and gifted children.

**Real Estate Oversight**

- Managed rental and investment properties for six large family estates, including tenant relations.
- Purchased the estates and managed remodel process from minor updates to multimillion-dollar remodels.
- Hired and managed all service providers such as landscapers and maintenance staff.

**Specialty Assets Management**

- High-value artwork and jewelry: collection management, appraisal services, transportation and security.
- Farms, ranches, equine exposures, antique and collectors' automobiles, and foreign road rallies.
- Aviation, mega-yachts and marine exposures including Certificates of Financial Responsibility (COFR) and pollution liability.

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*Early Career*

**Executive Assistant / Office Manager**                      *Confidential Company*

**Executive Assistant / Office Manager**                      *Confidential Company*

**Office Manager**    *Confidential Company.*

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**Education**

*Confidential* College

B.S., Bachelor of Science, Psychology