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Candidate Contact Information

Candidate Name:

Dr. Sherman Horton

Mobile:

(573) 864-9778

Email:

Dr.Sherman.Horton@gmail.com

Candidate Location:

Ashland , MO , 65010

Home:

N/A

Contact Preference:

N/A

Application Summary

Job Title:

Commissioner

Job ID:

197016001

Application Date:

06/11/18

Resume Updated:

05/21/18

Career Level:

Executive (SVP, VP, Department Head, etc)

Relocation:

Will Not Relocate

Rating:

Not Rated

Highest Education:

Doctorate

Work Status:

US - I require sponsorship to work in this country.

Screening Score:

no specified

Work Experience:

no specified

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Sherman E. Horton, Ph.D., Ch.Fc., C.L.U.

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EXECUTIVE, HIGHER EDUCATION

LEADERSHIP • OPERATIONS • FUNDRAISING • STUDENT AFFAIRS • BOARD-LEVEL STRATEGY

EXECUTIVE SUMMARY

- Experienced university-level professor, board-level strategist, and operations and finance manager with exceptional leadership, relationship building, and problem-solving skills developed over long career in sales territory management, board membership, and not-for-profit fundraising.
- Wide senior business and university-level management experience; performed all President's duties without the title for established, private Christian university, including recruiting new President, financial management, efficiency enhancement, organizational troubleshooting, and fundraising.
- Ten-year member of Southwest Baptist University Board; invited to join boards of AARP, Baptist Student Union, and multiple not-for-profits and churches. Provide board-level strategic and tactical guidance on growth issues, financial restructuring, fundraising, financial management, operational transformation, process refinement, and ongoing relevance to target audiences and market trends.
- Strong motivator, advisor, and crisis manager; create culture where everyone's voice is heard, and where strategies and goals build on consensus and collaboration.

Selected Achievements

- ✓ Consistent quota-beating and operations success as regional General Manager and District Manager for leading US insurance companies New York Life and Metropolitan Life.
- ✓ Repeated promotion throughout insurance career, starting as salesman and achieving District Manager role within 15 years. Agent of Year after just 2 years in industry; repeated year-after-year awards for beating quotas.
- ✓ Exceptional success as fundraiser, once personally raising \$1.5M in critically needed funding, and once negotiating \$1M donation from single individual.
- ✓ Strong background in financial planning, investing, estate planning, Probate, wills, and trusts, Durable Power of Attorney, Living Wills, charitable giving. Ph.D. in Finance, Chartered Financial Consultant.
- ✓ Leveraged outstanding people management skills and reputation for sincerity and listening to boost staff performance, solve staff problems, address productivity bottlenecks, introduce culture of collaboration and consensus, and train, mentor, and promote promising talent.
- ✓ Resolved student lawsuits and equitably balanced interests of competing stakeholders while assisting new President for regional, private university.
- ✓ Started own financial consulting firm counseling individuals with financial needs. Built reputation drawing unsolicited referrals for insurance and estate planning advisory services.

Core Competencies

Strategic Planning • Marketing Strategy • Startups • Team Building • Entrepreneurship • Operations Management
Marketing • Business Development • Product Development • Talent Development • Time Management
Research & Development • Advertising • Process Improvement • Operations Management • Goal Setting
Financial Management • Crisis Management • Consulting • Public Speaking • Customer Retention.

PROFESSIONAL HISTORY

Central Baptist Theological Seminary Professor & Financial Advisor

Shawnee, KS
2014–Present

- Teach financial seminar for Women in Ministry program. Advise on financial planning, student loans and payback, and retirement planning, with special attention to social security alternatives.
- Leverage combined Ch.Fc., insurance expertise, and Finance Ph.D. to counsel board on fundraising strategies. Leveraged extensive insurance expertise to propose life insurance scenarios with school as beneficiary as avenue to fundraising.

- Created win-win arrangement for school, donor, and donor's children by organizing donation of land that donor was unable to sell at full price, allowing full-price tax deduction. School sold land for enough to purchase life insurance policy with donor's children as beneficiaries, while still netting substantial cash.

The Financial Doctor

Ashland, MO

Founder, Owner, Principal Consultant

1995–2013

- Leveraged financial training and hands-on financial planning expertise to create regional financial consulting firm serving retail clients.
- Conducted financial planning, including tax strategies, retirement plans, prenuptial financial agreements, and college savings plans. Advised on IRAs, Keogh plans, and TSAs, and leveraged extensive insurance background to integrate insurance into comprehensive financial planning.
- Helped clients obtain insurance reimbursements initially denied by companies; applied life insurance knowledge to optimize life insurance coverages as part of divorce settlements.

Metropolitan Life Insurance Company

Columbia, MO

District Manager

1990–1995

- Recruited by Met Life to turn around failing territory including all of Central Missouri, with focus on removing waste, improving efficiencies, and regaining profitability.
- Managed 18 support staff and 60 agents across 6 offices throughout state of Missouri. Reported to company Vice President.
- Eliminated embezzlement and funds misuse problem; removed problem employees, recruited new staff, and upgraded training and mentoring.
- Consistently surpassed sales goals, winning yearly company trips throughout tenure.

New York Life Insurance

St. Joseph, MO

General Manager

1982–1990

- Managed 3 sales offices throughout state of Missouri with 9 support staff and 30 agents, reporting to company Vice President.
- Recruited and trained new agents. Managed finances for all 3 offices.
- Surpassed sales quotas every year, winning awards for production.

Earlier Roles

Associate General Manager, New York Life Insurance, Springfield, MO

Assistant Manager, New York Life Insurance, Springfield, MO

Field Underwriter, New York Life Insurance, Bolivar, MO

COURSES TAUGHT

Finance • Introduction to Financial Planning • Income Taxation • The Financial System in the Economy • Investments
 Life Insurance Law • Group Benefits • Pensions and Other Retirement Plans • Fundamentals of Estate Planning I
 Fundamentals of Estate Planning II • Financial Planning for Business Owners and Professionals • Probate Law
 Financial Planning Application • Why You Need A Will • Trusts • Social Security • Medicare • Medicaid
 Durable Power of Attorney • Living Will • Traditional IRA/ROTH IRA • Long Term Care Insurance
 College Savings Plans • Charitable Gifts • Investments 101

EDUCATION

Ph.D., Finance, Missouri University, Columbia, MO

Bachelor of Arts, Communications, Southwestern Baptist University, Bolivar, Missouri

Chartered Financial Consultant, The American College, Bryn Mawr, PA

Chartered Life Underwriter, The American College, Bryn Mawr, PA