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For Immediate Release

# Washington Depot, CT Agent Among a Select Group To Be Named a Certified Advisor of Personal Insurance

*By Wharton and Chubb*

Washington Depot, CT, October 26, 2015 — Kurt Thoennessen of Ericson Insurance Advisors in Washington Depot, CT has been awarded a Certified Advisor of Personal Insurance (CAPI) designation from the Aresty Institute of Executive Education at the Wharton School of the University of Pennsylvania and Chubb Personal Insurance.

Kurt Thoennessen is among a group of only 39 agents to receive the certification after completing a one-year intensive educational program on understanding the lifestyle and risk management and insurance needs of high-net-worth individuals. The program also helps agents to brand themselves as trusted high-net-worth advisors. Created by Wharton and Chubb in 2014, the CAPI program is the first of its kind to focus on a specific customer segment in the personal insurance marketplace.

“The agents who have completed the CAPI program have demonstrated that they have the high level of skill and expertise required to understand the total family balance sheet and advise high-net-worth individuals on their complex risk management and insurance needs,” said Stacey Silipo, director of strategic partnerships for Chubb Personal Insurance.

“We are extremely proud that Kurt Thoennessen has received the prestigious CAPI designation,” said Spencer Houldin, President of Ericson Insurance Advisors. “This shows his incredible dedication to the insurance industry as well as his commitment to serving our high-net-worth clients, who have a unique set of property and liability exposures created by their assets and lifestyle.”

The curriculum for the 12-month CAPI program included six modules related to the high-net-worth mindset, customizing insurance solutions, building client relationships, selling, excelling in the high-net-worth arena, and sustaining excellence. Courses, which are taught by Wharton faculty, Chubb subject matter experts and other professionals, include “Understanding the Total Family Balance Sheet,” “Collections,” (art, jewelry, antiques, wine, etc.), “Family Security,” “Relational Agility,” and “Building Your Personal Brand.” Classes are held on Wharton’s campus in Philadelphia, at Chubb Personal Insurance’s headquarters in Whitehouse Station, NJ, and online.

Courses were taught by Wharton faculty, Chubb employees and other experts who work with high net worth clients and their advisors. Agents received instruction on the Wharton campus at the University of Pennsylvania in Philadelphia, at the Chubb Personal Insurance headquarters in Whitehouse Station, NJ, and through virtual classes, webcasts, reading assignments and other online activities throughout 2014-2015.

**About Chubb Group of Insurance Companies**
Since 1882, members of the Chubb Group of Insurance Companies have provided property and casualty insurance products to customers around the globe. These products are offered through a worldwide network of independent agents and brokers. The Chubb Group of Insurance Companies is known for financial strength, underwriting and loss-control expertise, tailoring products for the needs of high-net-worth individuals and commercial customers in niche markets and select industry segments, and outstanding claim service.

The Chubb Group of Insurance Companies is the marketing term used to describe several separately incorporated insurance companies under the common ownership of The Chubb Corporation. The Chubb Corporation is listed on the New York Stock Exchange (NYSE: CB) and, together with its subsidiaries, employs approximately 10,000 people throughout North America, Europe, Latin America, Asia and Australia. For more information regarding The Chubb Corporation, including a listing of the insurers in the Chubb Group of Insurance Companies, visit www.chubb.com.

**About the Wharton School**
Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community one of the most published business school faculties, Wharton creates ongoing economic and social value around the world. The school has 5,000 undergraduates, MBA, Executive MBA, and doctoral students; more than 9,000 annual participants in executive education programs; and a powerful alumni network of 94,000 graduates.

**About Ericson Insurance Advisors**
Ericson Insurance Advisors is an independent insurance firm, with 75 years of experience in meeting the complex and unique needs of our clients. Equipped to assist clients in all 50 states, we are particularly well suited to serving clients with multiple properties in diverse locations, whether personal or commercial or both.

As an independent company, we work for our clients, first and foremost. With many different insurance companies available to us, we have greater flexibility in tailoring a program to the specific needs of each client, while at the same time offering highly competitive pricing.

What truly sets us apart, however, is our dedication to providing our clients with sound advice and superior service. Over the years, we have found that fulfilling this commitment requires having not just the right tools, but also the right people. From the principals to each member of our support staff, you will find that everyone at Ericson Insurance Advisors strives, every day, to exceed our client's expectations.

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