

Lisa M. Andrews, CFP®
School of Human Ecology, University of Wisconsin-Madison
4255 Nancy Nicholas Hall, 1300 Linden Drive, Madison, WI 53706
lisaandrews@wisc.edu

EDUCATION AND LICENSES

- THE AMERICAN COLLEGE, CFP® certification program 2007, certification awarded 2008
- UNIVERSITY OF WISCONSIN-MADISON, MBA, 2004
- BEMIDJI STATE UNIVERSITY, Bachelor of Science, Business Administration 1989
- REGISTERED INVESTMENT ADVISOR, Modern Financial Planning DBA Perk Planning

CAREER DEVELOPMENT

- Faculty Associate, Consumer Science**, University of Wisconsin-Madison **2018 to Current**
- Principal and Founder**, Perk Planning, Madison, Wisconsin **2010 to Current**
- Founder of this fee-only, hourly financial planning practice with 350+ households and businesses
 - Honed teaching skills through one-on-one client meetings and presentations to employee groups
- CEO**, Surebond Inc., Madison, Wisconsin **2008 to 2009**
- Developed and implemented strategic plan to lead this specialty chemical organization out of crisis
 - Executed turn-around plan leading to the successful sale of the firm
- Field Planning Consultant**, American Family Insurance, Madison, Wisconsin **2006 to 2008**
- Responsible for developing and presenting strategic growth plans to sales leadership teams
 - Key contributor to company-wide shift toward use of data-driven decision models
- AVP Marketing & Distribution**, PIC Wisconsin, Madison, Wisconsin **2004 to 2006**
- Developed company-wide marketing and distribution strategy of this \$80M insurance company
 - Responsible for the overall communication strategy for the 2006 merger with ProAssurance
- State Farm Insurance** **1990 to 2004**
- Agency Field Executive, Madison, Wisconsin *2002 to 2004*
- Managed 50 State Farm agents, six employees and over \$55M in insurance revenues
 - Responsible for recruiting, hiring and training field employees and agents
- Agency Field Consultant, Milwaukee Wisconsin *1999 to 2001*
- Oversaw the profit and performance management of 35 State Farm agents
 - Shared responsibility for recruiting, hiring and training field employees and agents
- Agent, Park Falls, Wisconsin *1996 to 1998*
- Operated successful State Farm Agency office responsible for premiums of \$2.5M
 - Achieved Top 100 status in 1997 and 1998 for new business production
- Advancement in Claims operations, Minnesota and Wisconsin *1990 to 1996*
- Positions held: Claims Representative, Claim Supervisor, and Auto Claim Litigation Superintendent
 - Duties included negotiation and settlement of third-party liability claims, defending company at arbitration hearings, supervising and training teams of bodily injury litigation claim representatives, and managing the defense of cases reserved in excess of \$100,000