



866.498.3441
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JOAN CLEVELAND

President and Chief Executive Officer
SWBC Life Insurance Company and SLIC Insurance Agency, LLC

EXPERIENCE



35 years in the life insurance industry

EDUCATION



University of Phoenix
Bachelor of Science in Business Administration

LICENSES



- General Lines Agent, Life and Health, and Annuity in all 50 states
- FINRA 6, 7, 24, 63, & 65

CERTIFICATIONS



- Chartered Life Underwriter®
- Chartered Financial Consultant®
- Registered Employee Benefits Consultant®

INDUSTRY ORGANIZATIONS



- Chairman of the Board, Consumer Credit Industry Association (CCIA)
- Vice Chairman, Texas Association of Life & Health Insurers (TALHI)
- Member of the Board, Life Insurers Council (LIC)
- Governing Board Member, Make-A-Wish of Central and South Texas

MY SPECIALTY:

I lead SWBC Life Insurance Company and SLIC Insurance Agency, LLC, strategically identifying new markets and implementing innovative distribution methods and product offerings. I employ Six Sigma analytical skills to drive process improvements to enhance the overall customer experience. I am adept at leveraging my expertise and creativity to integrate products, distribution, and marketing plans for the benefit of the consumer, our customers, and the company.

SERVICES:

- Implementation and administration of credit insurance and debt cancellation services
- Distribution and marketing of optional products

PRODUCTS:

- Credit Insurance
- Debt Cancellation
- Accidental Death & Dismemberment
- Life Insurance Products
- Home Warranty
- Pet Health Insurance
- Identity Theft Protection

PRESENTATIONS:

- Reaching the Underserved and Uninsured
- Mitigating Lender Default Risk
- Innovation and Insurance: Are They Really Compatible?
- The Role of Life Insurance within America—Markets, Products, Distribution

TARGET AUDIENCE:

Financial Institutions, Life Insurance Organizations, Financial Services Distribution Groups, and Consumer Groups