



## **Cameron Gerhard** **Relationship Manager**

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Cameron "Cam" joined the Gateway Financial team in July 2021, bringing with him a steadfast commitment to build trust and deliver personalized solutions to the unique needs and goals of Gateway's clients. His comprehensive knowledge of life insurance, financial planning, and risk management principles equips him to provide informed guidance and optimal solutions to meet the diverse needs of the firm's clientele. In his role as Relationship Manager, Cam provides strategic guidance and technical expertise to the executive team, supporting all aspects of life insurance proposals and financial modeling for new business prospects.

Known for his effective communication skills, Cam collaborates seamlessly with Gateway's internal teams, professional advisors, and clients throughout the entire new business timeline. He facilitates a smooth and efficient process, keeping all individuals informed and aligned.

In addition to his case management responsibilities, Cam assists the Director of Underwriting in the life insurance underwriting process for new business cases. He maintains workflow management reports and performs due diligence on carrier and product selection to aid in the placement of appropriate life insurance products. Cam generates new business illustrations and quotes, compares and contrasts them for competitiveness, and drafts client proposals and market studies. He also supports the administration of new business case flow, handling tasks such as billing, application preparation, trust and policy documentation, delivery requirements, and final policy checklists.

Cam also performs policy audits for potential clients on existing life insurance portfolios, presenting his findings to marketers, company COIs, or clients directly ensuring HIPAA guidelines are followed. He assists with the ongoing administration of in-force policies, including inforce illustrations, premium timing, cash value reporting, and policy changes.

Cam currently resides in Pittsburgh, PA and he enjoys golfing, reading, and traveling. As an avid Pittsburgh and WVU sports fan, Cam often attends sporting events and follows the success of his teams onscreen.

### Education:

- University of Pittsburgh, Bachelor of Science in Finance