

Application for Appointment

Profile

Which Boards would you like to apply for?

None Selected

_____ Timothy W _____ Morgan _____
Prefix First Name Last Name Suffix

_____ _____
Email Address

_____ _____
Home Address Suite or Apt

Oregon City _____ OR _____ 97045
City State Postal Code

_____ _____
Primary Phone Alternate Phone

How long have you lived in Oregon City?

1 Yr 6 months

Work Experience

TW Morgan Insurance Services _____ Agency Owner _____
Employer Job Title

How long have you worked for this company?

29 years

Work Address and Phone Number

Work Experience

My job involves working with small & large business owners and individuals in Oregon, Washington and California providing insurance and financial services products. I work with business firms operating fleet vehicles and trucking operations in addition to General Liability, business personal property and investment real-estate. I provide surety bonds for public works projects and individuals needing bonds to cover state business license requirements. Other areas of expertise include group medical plans, company retirement plans and workers compensation programs.

Education

Please list out any High School, Secondary Education, Trainings, and Colleges, along with years completed.

Graduated from the American School of Paris in St Cloud France, Attended the Universite' de Paris – Sorbonne and the American College of Paris, France. Business Administration.

Degrees

Business Administration

Certifications

FINRA, Commercial Helicopter, Airplane, EMT-1A

Community Involvement

Describe volunteer activity within this or other communities

Public service history. I severed a 4-year term as an airport commissioner in the 1980's for the City of Ukiah, California a position appointed by the Mayor of Ukiah and have held board of directors' positions for Condominium associations and trade groups related to the insurance industry and Aviation industry. Past member of the Mendocino County Sheriffs Air Squadron. The air squadron is a search and rescue operation as an extension of the Sheriff's Office.

Do you presently serve on a City board or committee?

Yes No

If yes, which board or committee?

Interest Statement

Explain your interest in this board/committee and why you think its issues are important

I'm a person that thinks outside of the box on how something can be done to promote progress. I like structure and rules to make the process equal for all, so you know what the rules are before getting started. I have great experience in working with people of many industries. I have experience in many areas of the various business environment by dealing with business owners, getting to know their operation and what obstacles they encounter in their daily activity. My business interaction allows me to see the challenges business face in dealing with ever changing government procedures and regulations.

List any relevant experiences, skills, or interests that have helped to prepare you for a position on this board or committee

I have been a business owner for the past 29 years. I have served on advisory boards of various industries.

Additional information

Professional Licenses Include Property & Casualty, Health, Life Insurance License in Oregon, Washington, California and Nevada and Registered Representative with FINRA Registered Securities for Oregon, Washington and California. I hold a Commercial Instrument Helicopter Rating and Commercial Airplane Instrument Single and Multi-Engine land rating.

Resume

[Resume_Tim_Morgan_Oregon_City_Transportation_Board_2020.pdf](#)

Upload a Resume

Information

Membership on City advisory boards, committees and commissions are open to all interested citizens subject to the qualifications determined by each individual committee, board and commission as necessary for the conduct of its business. There shall be no discrimination of applicants based on race, color, religion, sex, age, national origin, physical or mental disability, marital status, family status, status as a Vietnam-era or special disabled veteran, or membership in any other group protected by law in accordance with applicable federal, state and local laws. The City of Oregon City encourages participation in its affairs by all people, especially those who are represented in public involvement.

The information requested herein becomes public record upon submittal. A written request to not disclose certain information may be submitted to the City Recorder's Office for consideration.

Please Agree with the Following Statements

I certify that the information contained in this application is correct to the best of my knowledge. I understand that to falsify information is grounds for refusing to appoint me, or for removal should I be appointed. I authorize any person, organization or company listed on this application to furnish you any and all information concerning my employment, education and qualifications for appointment. I also authorize you to request and receive such information. In consideration for my appointment, I agree to abide by Federal and State law along with the rules and regulations of the City.

I Agree *

BY TYPING YOUR NAME BELOW YOU ARE AGREEING ALL THE INFORMATION PROVIDED WITHIN THIS APPLICATION IS TRUE.

Timothy W Morgan

Timothy W Morgan

Timothy W. Morgan

Position Seeking

Oregon City - Transportation Advisory Committee

Value Offered

- Twenty-nine years of Insurance and Financial Services experience in Oregon.
- Managing sales professionals and agency staff to exceed revenue growth and profit goals.
- Providing a customer experience that exceeds the competition.
- Proven track record of driving sales growth, client retentions and product expansion.
- Proven skills for staff development, training, technology and effective troubleshooting.
- Extensive knowledge of insurance risk assessment and underwriting experience.
- Solid experience in preparing and implementing Government contracts.
- Extensive knowledge of Commercial Insurance, hard to place risks, individual and group medical plans

Key Skills

Held management positions with 2 Fortune 500 companies. Own and operate a successful all lines insurance agency in Oregon. Experience in contract and sales presentation to government agencies both domestic and foreign. Extensive overseas business travel experience. Forecasting and Market Analysis, Sales Team Trainer for agency sales staff. Experienced background in determining risk analysis and working with insureds and claims adjustors to achieve client satisfaction. Resource for startup organizations in setting up their businesses and guiding them through the process of permits, licenses and insurance. Business operation experience includes payroll, workers compensation, rules of medical plans and Medicare, employee supervision.

Professional Licenses

Health, Life, Property, Casualty, Variable Products - Oregon, Washington, California & Nevada
FINRA Securities License 6, 63, Registered Principal Series 26 - Oregon, Washington & California
Commercial Instrument Rotorcraft Helicopter Rating; 4,300 flight hours
Commercial Instrument Airplane; Single & Multi Engine Land

Work Experience

Farmers Insurance - Tim Morgan Agency, Tigard, Oregon **2/2003 - Present**
President Council level agent servicing over one thousand households, 300+ business and \$12 Million Assets under management. \$2.5 Million in annual premium. For the past 18 years, our agency continues to be the lead agency for District 22 in policy growth, retention and sales count production. Primary product lines are Auto, Home, Life, Business, Specialty Markets and Financial Services.

T.W. Morgan Insurance Services, Tigard, Oregon **9/1991 - Present**
Established in 1991, TW Morgan Insurance Services is a full-service agency specializing in non-standard and preferred risk placement of insurance products for businesses and individuals. Serving the business sector for General Liability, Workers Compensation, Health, Disability, Long Term Care, E & O and Retirement plans. \$1 Million sales in annual gross premium.

Key Bank of Oregon, KeyCorp, Cleveland, Ohio **3/2007 - 10/2000**
VP District Manager - Oregon and SW Washington for 62 Key Bank Locations. As a startup operation, hired insurance staff to serve the customers of Key Bank. Supervised 18 financial services agents and 3 administration staff members from the Beaverton headquarters. A member of the Oregon executive team, responsibilities included cross selling our services to all business channel department VP's. Reported to the President of Keycorp Insurance in Cleveland, Ohio.

Mutual of Omaha Insurance Companies, Portland, Oregon 9/1991 - 3/1997

District Manager, Personal Producing Trainer, Sales Representative for this leading insurance provider. Provided agency development to a team of 15 sales professionals. Provided one on one field training to agents marketing Health, Life, Disability, Long Term Care, Annuities and Mutual Funds.

Evergreen Helicopters, Inc. McMinnville, Oregon 6/1990 - 5/1991

International Sales Representative for Europe and Eastern European countries negotiating aviation fixed and rotor wing services to government agencies, private and domestic corporations. Extensive experience in government contract negotiations with agencies such as USAID, NATO, World Health Organization "WHO" UN, US Dept of Defense.

Various Aviation Management and Pilot Experience 1982 - 1990

Held positions of Director of Operations, Chief Pilot, Director of Maintenance, General Manager, Director of Business Development and President. Employment with 2 Helicopter Airlines, EMS hospital provider and utility operators. Working with government agencies such as USGS, USFS, BLM, Department of Fish & Wildlife, Drug Enforcement Agency "CAMP" Program in Northern California. Established the first non-hospital-based air medical program with private and government agencies in Northern California.

Government Experience

1. Airport Commissioner for the City of Ukiah, CA. Appointed by the Mayor and City council board 1983-1987 as the youngest commissioner appointed to the local board at that time. Served four years.
2. Served as the Sales Representative for the World Health Organization ONCHO Program in Africa for Evergreen Helicopters.
3. Contract Liaison for aviation contracts with various Government agencies such as DOD, USFS, USGS, BLM, United Nations, USAID, Department of Fish & Wildlife.
4. Farmers Employees Agents Political Action Committee "FEAPAC" Active member, working with the Oregon Department of Insurance and our elected House and Senate Representatives in the Oregon legislation regarding changes in insurance law for our state.

Achievement Highlights

National Industry Awards - Insurance

Million Dollar Round Table Producer "MDRT" 2006

Round Table membership is an exclusive honor that is achieved only by a small percentage of life and financial services advisors worldwide. In 2006, MDRT is comprised of 32,981 qualifiers who reside in 74 nations and territories representing 480 companies.

Farmers Insurance National Awards:

- Presidents Council 2008, Farmers Top 1% Achievement Award 1 of 202 agents out of 16,000 nationally.
- Championship Award 2006 & 2008, Top 2% of Farmers Agents nationally.
- Toppers Club Award 2004, 2006, 2008, 2012, 2013, 2014 Top 10% of Farmers Agents Nationally
- Life Sales Blue Vase Award 2003
- Financial Services Silver Star Award 2003
- Wall Street Qualifier, Top 25 Financial Services Agents in 2003
- Shoot The Moon Award, Top 25 Financial Services Agents in 2005

Farmers Oregon State Awards & Recognition

- Award of Excellence Life Sales 2005 & 2007
- Masters Qualifier Commercial Insurance 2003
- Elite Commercial Agent. 1 of 14 Oregon agents for preferred underwriting status. 2008- Present.

Farmers Oregon District 28 Awards:

Top producer for Sales Count Production, Commercial, Life, and Financial Services from 2003-2012

Mutual of Omaha

- (3) Presidents Club Awards (2) Master Builders Achievement Award
- Oregon State Top Disability Producer

Highlights

Achievement

Aviation Industry:

- Helicopter Association International: "1987 Crew of the Year Award." HAI is an International Helicopter Trade Association for the advancement of rotorcraft. The award was in recognition for saving numerous flood victims lives during the 1986 Russian River Northern California flood.
- United States Forest Service "USFS", Chief's Aviation Safety Award, SE Alaska, for outstanding achievement in aviation safety operating in Alaska's adverse weather and mountainous terrain.
- Helicopter Association International "HAI" Operator Safety Award, 1982-1987.

Education

Palo Alto Military Academy / Harker Academy, San Jose, California

American School of Paris, St Cloud, France: *Baccalauréat Degree*

Universite de Paris-Sorbonne, Paris, France: Major in International Business Administration

American College, Paris, France: Major in International Business Administration, BS