

## Curriculum Vitae updated 05/13/2022

**Work 602-938-7579 Cell 602-463-5520 dave@idealins.com**

David Mitchell ("David") has held an Arizona Property and Casualty License since 1980 and Life and Health license since 1988. He has held the Certified Insurance Counselor (hereinafter "CIC") for over thirty years. Per the latest statistics of the National Alliance for Education and Research less than 1% of insurance producers in the United States have attained this achievement. To become a CIC an individual must attend one hundred hours of formal classroom hours and pass five rigorous examinations involving insurance policies their applications to the clients along with agency management policies and procedures. Upon receiving the designation, a CIC must attend 20 hours per year of classroom instruction over various insurance policies. David has attended over five hundred hours of classroom instruction with CIC primarily involving insurance policies.

In addition, David completed his Chartered Property Casualty Underwriter ("CPCU") in 2022. The CPCU designation consists of eight parts and is known by many as the highest professional property/casualty designation in the insurance industry.

David and his father Jack Mitchell co-founded Ideal Insurance Agency in 1982. Dan Mitchell joined Ideal Insurance Agency in 1983. The same year Ideal Insurance Agency Incorporated. David has remained an active partner with his brother Dan Mitchell until September of 2021. At that time Dan Mitchell sold his shares in the business and David is now 100% owner. David's responsibilities as owner include Marketing {including sales}, Strategic Planning, Finances, Human Resources including supervision.

David has taught continuing education insurance courses for the Independent Insurance Agents of Arizona and the Customer Service Insurance Representation Designation through the National Alliance for Insurance Education and Research since 2002. David has taught both personal lines (residential and personal auto courses), and commercial lines courses. He also has taught and continues to teach Agency Operations.

David has been an owner and insurance producer for over forty years. In addition, David teaches insurance producers as continuing education. David has his experience and education to draw on as he reviews cases and renders opinions. In court cases David, has consulted on over fifty cases as an insurance consultant and/or expert witness. The cases have primarily involved standard of care and coverage issues. David has drafted reports and testified as both a plaintiff and defense expert witness. In addition, he has both deposition and trial experience.

David served the Arizona insurance industry through reviewing sections of the Arizona Insurance State Producer Licensing Exam(s) from 1998 through 2018. Some years he has reviewed property and casualty and some years life and health insurance.

In 2016 David was instrumental in helping to start the Insurance Program through the Business Department at Glendale Community College. David has taught those entering the insurance industry through a pre-licensing class at Glendale Community College. He also taught other

AINS {insurance} through the Institute courses for college credit in personal and commercial property and casualty insurance.

As a non-paid position David was the State President of the Independent Insurance Agents of Arizona in 2008 to 2009 and served on the State Board of Directors four years and the Executive Committee for three years. He currently chairs the Membership and Education committees for the State Association for Arizona Independent Insurance Agents and Brokers of Arizona.

In 2004 David received the Archie Mendelsohn Award for leadership and mentoring new insurance agents in the insurance industry. In 2011 and then again in 2012 he received the Committee Chair of the Year Award from the Independent Insurance Agents of Arizona. In addition, in 2012 David received the Charles W. Traubel Memorial Award given as a tribute in recognition of Charles W. Traubel who maintained the high standards of service and integrity for insurance in Arizona and is awarded to a recipient who has made an extra effort and contribution in time and effort to further the interest of the Independent Insurance Agents of Arizona.

On September 8, 2016, David was appointed to serve again on The State Board of Directors for the Independent Insurance Agents of Arizona as a non-paid position. Then again David was appointed for a one-year term in September of 2017 to serve on the Board of Directors for the Independent Insurance Agents of Arizona. In 2018 he was again elected to the Board of Directors where he served on the Board until April 29, 2021, as a non-paid position.

David serves on the Board of Directors for Arizona Justice Center. An organization that provides legal services to the homeless and working poor in Arizona. This is a non-paid position. He has worked as a consultant/expert witness pro-bono for the working poor and homeless.

David has attended several colleges. In 1995, he received his bachelor's in management. He then received his master's degree in Business Administration (MBA) from the University of Phoenix in 1998. David Mitchell went on to receive his second master's degree in Human Resources (MA.HR) in 2001 from Ottawa University. Along with the MA.HR Dave holds the Senior Professional Human Resource Designation (SPHR) issued through HRCI and Senior Certified Professional in HR (SCP) issued through SHRM. Both the SPHR and the SHRM-SCP are two of the highest professional designations in the discipline of Human Resources. David's unique background in insurance and human resource management provides an in-depth opinion on insurance agency operations, and the duties performed by an insurance producer and agency.

David was recently hired (March of 2022) as an adjunct professor in risk management at Rio Salado Community College, where he currently teaches. David was an Adjunct Professor at Western International University ("WIU") from 2002 through 2015 and has also taught at DeVry University. At WIU David primarily instructed General Business and Human Resource Courses. He has taught Business Management, General Human Resources, Employment Law, Health and Safety in the Workplace, and Labor Management through various classes at the collegiate level. At the collegiate level, David, has taught both the undergraduate and graduate level courses. At

the graduate level, he has taught Intrapreneur/Entrepreneurship. In addition, David taught the Undergraduate Capstone class for several years that included several disciplines.

David has served and continues to serve on the President's Circle Advisory at Glendale Community College from 2004 to present. This is not a paid position, but he was and continues to be invited to serve as a consultant.

David continues to serve in a non-paid position on the Northern Arizona University PL Management Advisory Board. He has served on this board since October of 2018.

Ideal Insurance Agency currently belongs to two west valley Chambers of Commerce (Peoria, and Glendale). The Agency has been a member of the Glendale Chamber of Commerce since 1994. In 1999 the Glendale Chamber of Commerce awarded Ideal Insurance Agency "Partner of the Year Award," The Agency was given another Award as "Member of the Year" in 2001. In 2005 the Business Journal and the Glendale Chamber of Commerce presented the "All Star Company Award" to Ideal Insurance Agency. In February of 2016 David won the award "Volunteer of the Year" for the Surprise Chamber of Commerce.

David was elected as a non-paid position to the Glendale Chamber of Commerce Board in 2001 for a three-year term and re-elected in 2004 for another three years. In 2004, he served as Chair of the Board as a non-paid position. In July of 2011 David Mitchell was asked to again serve on the Board and was appointed to this position. In 2013 David was elected and in January 2014 began serving as Chair of the Board for the Glendale Chamber of Commerce as a non-paid position. In 2015 David became Past Chair and served on the Board of Directors and Executive Board through 2015. He has frequently been called upon to provide insurance advise to both the Glendale Chamber and many of their members. David serves on the Peoria Chamber of Commerce Board of Directors. In June of 2019 David was elected to serve as Chair for the Peoria Chamber of Commerce, and he finished his term as Chair on December 1, 2020. He continues to serve the business community on the Board of Directors as a non-paid position. David has frequently been called upon to provide insurance advise to the Peoria Chamber of Commerce and various members.

David was co-chair for the 2017 Hometown Christmas Parade in Glendale and served as co-chair as a non-paid position. It has grown to be the largest parade (number of entries) in Arizona with the proceeds going to Operation Santa Claus and Glendale's Food Bank "Hope for Hunger" a part of Phoenix Rescue Mission. In 2017 over 100,000 lbs. of food was donated to Hope for Hunger from the Hometown Christmas Parade. David advised several of the parade entrants along with the board of directors on coverages they needed to carry. I wanted no conflict of interest while chair of the parade, so I only made insurance/risk management recommendations pro bono.

Articles Written and Published include:

1. HR Risk Management Tip-Employees Using Their Own Vehicles for Company Business February 2006. Published by News and Views 2005 (Independent Insurance Agents of Arizona Publication) also revised and published in HR & Employment Law Compliance

### Guide for Arizona Employers

2. How to Navigate Employees through the Storms of Our Economy. Coauthored with Stewart Segall PhD News and Views March/April 2009
3. Independent Contractors or Employees News and Views March 15, 2011
4. Happy New Year It's That Time Again News and Views Coauthored with John Perkins MBA, SPHR January/February 2012
5. Is it a Just a Job or is it a Profession? The Auto-Owners Trade Magazine Emblem August Edition 2016