

# Nathan M. Herbst

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## Sales and Management Professional

Results-driven leader with extensive experience in real estate valuation, consultative sales (wholesaling and direct), and Team Management; leading through innovation in product, process, and technology.

Areas of expertise include:

- Real Estate Agency-Full Service Brokerage ▪ Relationship Management ▪ Technology Implementation  
▪ Telesales/Operations Management
- Wholesaling ▪ Life Insurance ▪ Annuities ▪ Marketing/Social Media

## Professional Experience

### ❖ Contractor/Consultant-PTAB Evidence Review

- *Lake County Board of Review- Waukegan, IL.* 1/14/2021 – Present
  - Review, comparable search, evidence preparation and submission for Lake County hearings in front of the Illinois Property Tax Appeal Board (PTAB).
  - Providing technical analysis and monitoring of integration issues with the Tyler system.

### ❖ Alternate Member-Board of Review

- *Lake County Board of Review- Waukegan, IL.* 6/11/2019 – Present
  - Review of appellant and assessor evidence via quasi-judicial hearings to render taxable property value assessments for real estate parcels in Lake County, IL.

### ❖ Broker Associate (Real Estate Agent)

12/11/2017 – Present

- *Baird & Warner. Chicago, IL- Libertyville, IL Office 200 N Milwaukee Ave. 60048*
  - Providing professional real estate agency services to buyers, sellers and investors in Northern Illinois and internationally by referral.
  - Real Estate Consultation services such as valuation, property management, and renovation.

### ❖ Regional V.P. of Wealth Management (Financial Consultant)

11/1/2015 –

12/11/2017

- *Buckeye Wealth Advisors (Clearing through: **Securities America**). Hawthorn Woods, IL.*
  - Providing clients with consultation on mutual funds, life insurance, variable annuities and other retirement income and/or wealth transfer products and their placement.

### ❖ Sr. Regional Marketing Specialist (Hybrid Internal/External Wholesaler) 1/23/2008 – 5/29/2015

- *AIG (SunAmerica), Schaumburg, IL*
  - Provided Telesales/live consultations for Major Wirehouse financial advisors and support staff on product details, compliance requirements, technology support, and sales presentations.
  - Coordinated and traveled to regions to provide variable annuity product training and assistance with client sales meetings and seminars for wire house and regional financial advisors.

- Provided onboard training for new internal wholesaling employees.

#### ❖ **Team Leader-Internal Wholesaler**

11/2006 – 1/2008

##### ➤ *Prudential Financial, Buffalo Grove, IL*

- Acted as “Player/Coach” leading Internal Sales Team to goal setting, sharing best practices, sales ideas, and to provide a conduit for communication between departments.
- Onboarding/ongoing training of new hires and developed retention programs. Turnover dropped from 37% to 12% post implementation
- Drove training on variable annuity block of business acquired from Allstate for the entire Internal/External Sales Force.

#### ❖ **Regional Sales Consultant (Internal Wholesaler)**

11/2003 - 11/2006

##### ➤ *Allstate Financial/Prudential Annuities, Northbrook, IL*

- Leveraged product knowledge and operational experience to assist Financial Advisors at major Wirehouses with direct sales to their clients.
- Responsible for preparing and delivering hypothetical illustrations and sales presentations as well as delivering training for financial advisors in annuity products and their uses. Regional travel and telephone wholesaling. Achieved aggressive sales targets in fixed and variable annuities consistently.

#### ❖ **Unit Manager- Image and Document Services**

5/2002 - 10/2003

##### ➤ *Allstate Financial, Vernon Hills, IL*

- Led team of 23-30 direct reports in the design, implementation, and execution of the image and document scanning services department for Allstate Financial.
- Worked with vendors to establish requirements and implement new technologies.
- Managed day-to-day activities for multiple functions including the operation of mail sorting and imaging equipment, data collection functions, client financial services and file retention and retrieval.

## Professional Licensing

- Licensed Real Estate Broker, IL. IDFPR IL (current)
- Illinois Assessment Board of Review Alternate Member Exam (current)
- NASD Series 6, 26, 63, 24 licenses (expired)
- Illinois Life and Health Insurance License (expired)

## Education & Skills

- **Bachelor of Arts-Colorado State University- Ft. Collins, Colorado**

- Concentration in Theater: Directing, Improvisational Acting and Oration

■ Consultative Sales Training (Sequoia) ■ Top Gun Sales Training ■ Microsoft Office Suite ■ Salesforce.com ■ Lotus Notes ■ Vendor/Procurement and Project Management ■ Seibel ■ Janna ■ Kodak Imaging and Input Accel Imaging Package ■ AnnuityExpress ■ AnnuityPro (Bluefrog) ■ vBulletin ■ Sketchup ■ Blender ■ PhotoShop ■ Adobe Acrobat ■ G-Suite ■ Tyler Systems IAS World

## Hobbies and Interests

- **Cub-Master-Cub Scout Pack 189:** Fremont Elementary School, Mundelein
- **Assistant Scoutmaster-Troop 303:** Lord of Glory, Grayslake

- **Director:** *"Special Agents for Charity": Improv Team benefiting PADS of Lake County*
- **Volunteer Roleplayer** *Northern Illinois Police Alarm System (NIPAS) Emergency Services Team:*  
25 Participating Municipalities
- **Board Member:** *Chicago Marine Aquarium Society: Chicago, IL.*
- **Founder/Owner:** *[www.chicagolandreefs.com](http://www.chicagolandreefs.com)*