



(713) 417-0009

roberto@preminsure.com

Roberto I. Coello

Roberto Coello is a solutions-focused financial professional with more than 15 years of success across the insurance, financial services, and securities industries. Leveraging extensive experience growing a startup insurance firm into a multimillion dollar business, he is a valuable asset for companies in the financial services and insurance sectors going through securities information issues or working on business development and how to strategize for growth. His broad areas of expertise include CRM, business development, process optimization, underwriting, strategic planning, project management, team building, health insurance, commercial insurance, customer service, workers compensation, sales management, and financial planning.

Throughout his executive career, Mr. Coello has held key positions at companies including MassMutual Financial Services, Premium Multiservice LLC (dba Premium Insurance & Income Tax), and Infiniti Insurance Services. As President and Co-founder of Houston-based Premium Multiservice since 2005, he runs the accounting and HR divisions, develops marketing plans for each location, and has been instrumental in growing the insurance and tax services company to 3,500 clients and \$3.5 million in annual revenue. He has also been a Financial Services Professional with MassMutual since December 2015, developing markets in the Houston region with a focus on fulfilling business and personal fact finder requests for optimal client analysis. He previously spent three years as a Financial Manager with Infiniti Insurance, where he serviced commercial accounts and brought the office up to date with modern technology to improve efficiency and record keeping.

Roberto holds a BS in Mechanical Technology with specialization in process and design, an MBA with a specialization in Sales from the University of Houston and has been awarded a Certified Family Business Specialist designation from the American College of Financial Services.

He is an association board member with nonprofits Hutchins Street Square and Texas Autism Academy. He is also a volunteer & sponsor with Learning in Full Effect (L.I.F.E.) and Wharton PTO.