



Financial Services

A Division of CP Insurance Associates

With combined insurance experience of more than 100 years, our team of professionals stand ready to provide insurance assistance to your financial institution.



Connie Tolles, ASCR, CIC, CRM, VP of Business Development
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As a Professional Lines Account Executive for 14 years with IBAT FS, and the underwriter for the IBAT Bond Trust for 8 years, Connie has come to know and appreciate the risks associated with Community Banks. Now with CP, she continues to apply those skills as she negotiates on your behalf with our underwriting partners. She advocates for her clients and strives to fully understand their unique risks and management characteristics. She is proud to have earned designations as Certified Risk Manager and Certified Insurance Counselor. She holds a BBA in Business from Sam Houston State University and has more than 23 years of experience in the insurance industry.



Valarie Ure, Senior Account Executive
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Valarie has more than 35 years of insurance industry experience and completed the Certified Insurance Counselor program in 1989. In her role as Agency Manager for First Victoria National Bank's insurance operation, Valarie had firsthand experience negotiating the insurance coverage for a large community bank. Having joined IBAT Financial Services in 2012 as Sales Director and contributing to the success and growth of that agency, she is now proud to be part of the CP Financial Services team where she continues in her banking specialization with expertise and focus on property & casualty. Her goal is to make a difference for the clients she serves. Her strength lies with her professional service, caring for her client's needs and delivering customer service and servant leadership beyond compare. Her experience can help you cut through the details of any insurance program and determine which products and services best serve you and your bank.



Kristen Cupit, CIC, Account Manager
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Kristen started in the insurance industry when she was a mere 22 years old. Now, 8 years later she has not only proven that customer service is her top priority, but also knows that putting her clients' needs first is what is most important. Kristen graduated from Texas A&M with an economics degree in 2015, the same year she decided insurance was the ultimate career path. She got her start in a support role for account managers but quickly advanced to having her own book of business and achieved her Certified Insurance Counselor designation. Kristen is eager to meet the demands of the ever-changing insurance needs for banks and will always lend a helping hand.



Beatrice Vargas, Administrative Assistant
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Every good team has a valued Administrative Assistant and CP FS certainly has that in Bea! Her skills in managing a database of information, day-to-day customer service needs and carrier follow-up help keep the team productive. Beatrice has more than 15 years of experience in the insurance industry.

“The Solution”