

# EMMA JOHNSON

## Annuity Specialist

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### PROFESSIONAL SUMMARY

Dynamic Annuity Specialist with 7 years of experience in financial services, adept at managing client accounts, resolving complex issues, and enhancing sales strategies to drive revenue growth.

### WORK EXPERIENCE

#### Annuity Specialist

Seaside Innovations

📅 Jan / 2021-Ongoing

📍 Santa Monica, CA

1. Processed a variety of financial transactions, including death claims, ensuring compliance with regulations.
2. Addressed client inquiries and conducted thorough research to resolve issues efficiently.
3. Managed suspense items, maintaining an average age of under 10 days consistently.
4. Trained new hires and assisted management in departmental transitions, enhancing team performance.
5. Acted as a primary contact for urgent requests, ensuring timely responses and resolutions.
6. Oversaw contract establishment, payment inquiries, and rejection notice processing, ensuring accuracy.
7. Collaborated on special projects, consistently delivering results ahead of deadlines.

#### Annuity Specialist

Summit Peak Industries

📅 Jan / 2018-Jan / 2021

📍 Denver, CO

1. Developed expertise in various Prudential Annuities, including variable and fixed products.
2. Communicated effectively with financial advisors and clients, leveraging in-depth product knowledge.
3. Conducted extensive research to resolve complex issues related to trades and withdrawals.
4. Utilized strong organizational skills to manage multiple applications and tasks simultaneously.
5. Educated partner agents on Annuity and Life Insurance strategies to enhance sales opportunities.
6. Built and maintained trust-based relationships with clients throughout the sales cycle.
7. Identified client needs and crafted customized financial plans to meet their objectives.

### EDUCATION

#### Bachelor of Science in Finance

University of Illinois

📅 Jan / 2015-Jan / 2018

📍 Santa Monica, CA

Focused on financial management, investment strategies, and risk assessment.

### SKILLS

Effective Communication Skills



Client Relationship Management



Annuity Product Knowledge



Financial Analysis



### ACHIEVEMENTS

- ★ Increased annuity sales by 25% through targeted client engagement strategies.
- ★ Streamlined processing time for claims, reducing turnaround by 30%.
- ★ Achieved a 95% client satisfaction rate through effective communication and support.