

ROBERT SMITH

Jr. Associate Agent

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SUMMARY

Provided customer service for clients as well as agents, provided quotes, material as needed for presentations. Followed up on underwriting, ordered medical records, created and maintained electronic files. Prepared organizations' production reports pulling information from various sources and incorporating into an excel spreadsheet.

SKILLS

Micorsoft, various CRM's and client database knowledge.

WORK EXPERIENCE

Jr. Associate Agent

ABC Corporation - July 1996 – September 2001

- Gathered and entered data from multiple sources for reports, production items, provided appropriate quotes, forms, marketing material as needed.
- Helped plan and organize company functions.
- Answered the telephone, greeted clients, problem solved for clients.
- Matched clients request with appropriate product, helped agents in the sales area for the product.
- Used various companies software to provide extremely accurate and appropriate presentation for agents.
- Responded to written and electronic correspondence on a daily basis.
- Ordered medical records, handled field underwriting for clients with various medical conditions.

Associate Agent

Delta Corporation - 1994 – 1996

- Active sales representative Facilitated customer service relations with clients Developed successful marketing campaigns increasing commercial .
- Independently developing and executing marketing plans and campaigns Qualifying prospects using creative methods to assist in building a book of .
- Wrote and Maintained new business Personal and Commercial lines sales Performed annual reviews with policy holders to ensure proper coverage was in .
- As an associate agent, I am responsible for marketing life, health property and casualty insurance and investments to new and existing clients of the .
- Gather client information to discuss products to meet insurance needs Write quality risk policies based on underwriting requirements Promote agency .
- Obtain and continue education for Insurance License Quote and sell insurance for new customers Service policies for existing customers Process .
- Marketing and prospecting new accounts Managed production schedule by establishing priorities Conducting ON YOUR SIDE REVIEWs Daily office task- .

SCHOLASTICS

- life, health, long term care - (American College)