

Commercial Account Executive (Finance)

ROBERT SMITH

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Objective

Experienced, loyal and clearly dedicated Commercial Account Executive with 8 years of experience in the Finance domain, who has the ambition to succeed in any given environment. With strong communication skills and leadership; able to prioritize, delegate tasks, and make sound decisions quickly while maintaining a focus on the bottom line.

Skills

Salesforce, Excel, Microsoft Office, Sales

Work Experience

Commercial Account Executive (Finance)

A Insurance - October 2015 – Present

- Reviewing audit policies, verifying accuracy and facilitating corrections, as needed, between client and carrier.
- Verifying policy and policy change information, facilitating corrections when necessary.
- Ordering and issuing the binders, certificates, policies, endorsements and other related items, verifying their accuracy and forwarding them to the client with appropriate correspondence.
- Determining if direct or agency billing is appropriate and invoices accordingly.
- Processing the incoming mail and phone requests, responding promptly and appropriately.
- Using the agency credit and collection policy in invoicing and pursuing prompt payments, requesting cancellations from the carrier according to the Agency standards.
- Determining the reasons for requests for cancellations and acts to savings accounts.

Insurance Broker

Goji Insurance - September 2011 – October 2015

- Sold auto, home, boat and other various insurance products to individuals and affinity groups within the assigned territory.
- Developed and maintained long-term relationships with the policyholders and small business entities.
- Identified and qualified customer needs, developed sales strategies and negotiated and closed the profitable projects.
- Analyzed sales volume, retention and loss ratio trends to identify areas for improvement.
- Reported policy changes and company conditions affecting customer satisfaction.
- Responsible for managing renewal accounts by rounding out and reviewing current policies.
- Numerous letters of commendation from customers for outstanding service.

Education

High School Diploma - 2011(Marlborough High School)