

Robert Smith

Trusted Insurance Advisor

PERSONAL STATEMENT

Insurance Advisor with 5 years of experience is looking for a position requiring expertise in Personal Lines Property and Casualty insurance with success in sales and customer service. Strong interest in utilizing relationship building and needs analysis skills to ensure client satisfaction generating renewal and referral business. Professional Experience and Responsibilities.

WORK EXPERIENCE

Trusted Insurance Advisor

Allstate Insurance - April 2013 - March 2017

Responsibilities:

- Sold and cross-sold the various types of insurance policies that include automobile, homeowners, renters and condo insurance as well as flood, event, and commercial insurance.
- Continued to build upon customer experience with constant contact and continuous follow up using work items such as pre-renewal insurance reviews, advanced notice advisory of results from home inspection concerns and conditions as well as advance notice of surcharges.
- Maintained knowledge of Allstate products following all compliance guidelines and procedures and ongoing relationship with risk management department.
- Researched and resolved customer billing inquiries, maintained customer records using e-agent.
- Educated customers on the details of small business insurance and advise on best policy options.
- Collaborated with a team of 10 other insurance agents to address 2,000+ customer requests per week in a timely.
- Developed and maintained close relationships with realtors and mortgage brokers.

Insurance Advisor

ABC Corp - January 2012 - February 2013

Responsibilities:

- Advised people on their insurance needs to ensure that all of their risks are accounted for.
- Developed trusting ongoing relationships with prospects and existing clients.
- Determined clients financial position, needs, and goals then develop a plan for them to achieve these goals while offering protection from the financial derailment.
- Developed marketing plan utilizing email, postal, telephone, and social media, trade shows, and seminars.
- Met and exceeded goals, three consecutive months on the sales leaderboard and agent of the day for one month.
- Traveled, met, fact finds and presented to individuals, families and business prospects.

CONTACT DETAILS

1737 Marshville Road,
Alabama
(123)-456-7899
info@qwikresume.com
www.qwikresume.com

SKILLS

Payroll, A/P & A/R,
Banking, Cashier,
Quickbooks, Excel,
PowerPoint, Word, And
More, Multiple Phone
Lines, Customer Service,
Marketing, Medical
Office, Mac Computer,
Driver Dispatch,
Insurance Verification,
Insurance Authorization,
Insurance Agent,
Production Floating
Specialist,
Manufacturing, Medical
Billing, Safety Quality
Control

LANGUAGES

English (Native)
French (Professional)
Spanish (Professional)

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

Reference - 1 (Company
Name)
Reference - 2 (Company
Name)

- Consistently built client relationships and developed trust by demonstrating strong work ethic.

Education

Bachelor Of Science in Small Business Management - 2010 (Fashion Institute Of Design And Merchandising - Los Angeles, CA)Business Law - (Canada College - Woodside, CA)