

Robert Smith

Insurance Advisor

CONTACT DETAILS

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

PERSONAL STATEMENT

Skilled Insurance Advisor, committed to addressing customer concerns with speed, accuracy, and professionalism. Excels in cultivating client relationships. Proficient in selling to grow market share and profitability.

SKILLS

Clerical, Excel, Microsoft Excel, Microsoft Word, Problem Solving, Management

WORK EXPERIENCE

Insurance Advisor

Max New York Life Insurance Co. - 2010 - Present

Responsibilities:

- Understanding and meeting customer transaction needs quickly, professionally and accurately.
- Keeping updated with the relevant products, services, and programs offered by the co., introducing clients to the sales manager and setting up appointments for sales.
- Using logic and reasoning to identify the strength and weakness of alternative solutions, conclusion, and approaches to problems.
- Serving as customer advocate and/or guide through complex processes, including benefits, claims, eligibility (on/off marketplace), billing, password resets, and blue access.
- Helping clients with their documentation mailing them their finished products.
- Manage client policies, as agreed with the client, keeping in mind risk tolerance, budget, and assets.
- Selling insurance in a high performing office and exceeded daily activity goals which helped the agency meet annual milestones.

LANGUAGES

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

INTERESTS

Climbing
Snowboarding
Cooking
Reading

Insurance Advisor

ABC Corp - 2008 - 2009

Responsibilities:

- Managed a book of business in excess of 1.5 million in premium volume.
- Worked closely with business owners primarily small to medium size businesses advising on risk and insurance.
- Developed and implemented sales plan and manage all phases of the sales cycle from prospecting to close and follow-up support.
- Represented a full line of insurance products, serving as a trusted advisor to businesses and individuals.
- Recruited, trained and mentored new insurance agents, and create a fun and productive work environment.
- Documented call education attempts and outcomes via facets for call metric tracking.
- Prospect for potential clients through mall shifts, business canvassing, personal observations, and referrals.

REFERENCES

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

Education

Advance Certificate in PC Applications - 1999 to 2000(NIIT -
Mumbai, Maharashtra)B.Com in Commerce - 1977 to 1982(University
Of Mumbai - Mumbai, Maharashtra)