

Financial Services Professional

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Objective

Great depth in multiple career fields. Highly organized with an acute attention to detail.
Outstanding in a team environment.

Skills

Technical Skills, Problem Solving Skills.

Work Experience

Financial Services Professional

New York Life - April 2013 - 2020

- Identified financial goals and concerns.
- Illustrated what needs to be done to reach goals and concerns.
- Identified gaps, if present, and offer solutions with products and services provided by the company and/or others.
- Achieved Rising Leader status. Skills Used Presentation, Networking, Sales, Client Services, Marketing, Consulting, Leadership.
- Led Agency in the Lives counts for Sophomore.
- Obtained life, health, long-term care, and securities licenses.
- Followed up on emails and client concerns in a timely manner.

Financial Services Professional

ABC Corporation - 2010 - 2013

- Develop a base of long-term sources of clients through use of personal observation and referrals through occupational and community-based groups to compile lists of prospects.
- Contact prospects through networking, mailings and phone solicitations; public speaking and community events.
- Determine clients particular needs and financial situations through fact-finding appointments; determining extent of present coverage and investments and ascertaining long-term goals.
- Create and deliver a coordinated protection plan by calculating and quoting rates for immediate coverage action and long-term strategy implementation.
- Application completion and follow-up until completion through declination or successful delivery.
- Enhance personal and agency reputation through value added approach to customer service..
- This is Dummy Description data, Replace with job description relevant to your current role.

Education

B.A. in Communication - (St. Edward's University - Austin, TX)