

Carla Foster

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Insurance Sales Professional

Entrepreneurial DEF Insurance agent with a history of surpassing customer and employer expectations. Leverage consultative-sales strengths to nurture relationships and close deals. Comprehensive knowledge of financial and insurance products, services and best practices.

Specialties:

- ✓ Personal and commercial insurance: auto, home, business, health, life
- ✓ Retirement plans: IRA (Traditional and Roth), 401(k), Solo 401(k), 403(b)
- ✓ Education plans: 529 plans, Coverdell Education Savings Accounts
- ✓ Long-term-care and estate planning

Experience

ABC AGENCY / DEF INSURANCE • Sometown, IL

Insurance and Financial Services Agent, 3/2013 to Present **Agency Intern**, 9/2012 to 3/2013

Manage all phases of the sales cycle—from prospecting to close and follow-up support. Represent a full line of insurance and financial products, serving as a trusted advisor to businesses and individuals.

- Drove a 15% revenue increase in FY2016, outperforming “high-reach” sales targets every quarter.
- Increased referral business by 27% in 2016. Initiated an aggressive campaign of cold-calling, offering referral incentives and participating in networking events.
- Earned awards for excellent sales performance, including Legion of Honor and Bronze Star awards.
- Met and frequently exceeded the financial objectives of represented clients. Assessed risk tolerance and investment/risk-management goals to recommend solutions optimally suited to client needs.
- Provided sound financial, insurance and wealth-management services to protect and grow client assets.

ABC RETAIL COMPANY • Sometown, IL

Sales Representative, 10/2010 to 6/2012

Served as a department store sales rep while attending college. Excelled within service-oriented industry.

Education & Training

ABC UNIVERSITY • Sometown, IL

Bachelor of Science, Major: Business Management | Minor: Marketing

Designations: FINRA Series 6 and 63; FINRA Broker/Agent; Life and Health; Illinois Long-Term Care (LTC) and Property & Casualty (P&C) licenses; Financial Services Certified Professional (FSCP)

Recent Training: Long-term care, estate planning and retirement

Member: National Association of Insurance & Financial Advisors

“...Carla has that rare combination of drive, industry knowledge and interpersonal skills. She is a rising star at our company...” — Jordan Yu, Supervisor

“...Carla was incredibly helpful when my husband and I switched our insurance provider to DEF Insurance. I know we made the best choice!” — Mary Hart, Client