JESSICA CLAIRE

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PROFESSIONAL SUMMARY

Accomplished and resilient financial services professional with 11 year history of success in client sales and consulting, entrepreneurship, and leadership. Fearless leader passionate about growing others personally and professionally through servant leadership. Highly adept at client building, accountability, strategic thinking and planning, coaching and mentorship, and professional development. Confident self-starter aiming to leverage my experience and talents to develop a career in sales.

CORE COMPETENCIES

- Interpersonal Savvy
- Influential
- Self-Awareness
- Critical Thinker
- Analytical
- Disciplined
- Composed
- Active Listener

EDUCATION

University of Indianapolis
Indianapolis, IN • 12/2009

Bachelor of Science: Sports Marketing & Finance

- Graduated cum laude
- Division II athlete: Baseball & Football
- Elected Captain of football team

DESIGNATIONS

Chartered Leadership Fellow (CLF): 2/2017
The American College of Financial Services - King of Prussia, PA

WORK HISTORY

Publicis Groupe Sa - Financial/Wealth Management Advisor
Seattle, WA • 02/2010 - 07/2019

- Built client base of 500+ new clients through high level activity, intentional prospecting, and mastery of sales cycle.
- Partnered with families & businesses to define, build, and establish financial security by taking them through a comprehensive financial planning process.
- Conducted in-depth fact finding meetings with clients to assess their overall financial picture, goals and objectives, expenses, income, insurance coverage, tax status, risk tolerance, and other information needed to develop a financial plan.
- Analyzed financial documents received from clients and reviewed existing accounts and policies.
- Designed and presented a personalized planning analysis with recommendations and illustrations tailored to each client's goals and objectives.
- Advised strategies pertaining to budgeting, savings, debt reduction, asset & income protection, education funding, retirement solutions, investment & advisory services, trust services, estate planning, employee & executive benefits.
- Educated and empowered clients to make simple decisions regarding complex financial goals.
- Achieved 95% client retention by cultivating and strengthening relationships through annual review process and full client service as needs change.
- Expanded personal and professional growth by attending various seminars, sales schools, continuing education, and hiring a business coach.
- Recruited and developed support staff on workflow, administrative processes, and procedures to facilitate consistent and seamless business operations.
- Executed monthly profit and loss analysis as well as business forecasting with use of inventory management and tracking business ratios.
- Developed annual business plan to update goals and vision, identify blind spots and areas of opportunity, and generate an action plan with tactics and strategies to drive growth.
- Sold and implemented 900+ life, long term disability, and long term care policies, placing in force $160M of life insurance face value, $1M monthly long term disability face value, over $1M annual premiums, and $10M invested assets.
- Pacesetter First 40 achievement. Awarded to 3% of all Northwestern Mutual Advisors for having sold 40 policies in the first six months of their business.
- Part of top 12% of advisors invited to attend prestigious and exclusive “Fastrack Academy” hosted by home office in Milwaukee, Wisconsin.
- Consistently exceeded annual production goals leading to recognition as top quartile producer among peers nationally.
- Recognized as digitally savvy advisor for proficient use and integration of CRM software, Personal Planning Analysis software, financial modeling, Outlook, insurance & investment proposals, E-files & applications, advisor website, social media, and Microsoft Office Suite.

Northwestern Mutual Life Insurance Company - Field Director
City, STATE • 08/2014 - 12/2018

- Concurrently grew personal integrated practice while attracting and selecting 20+ full time financial advisors for my unit and other offices.
- Demonstrated success leading, developing, and retaining a team of successful financial advisors.
- In 2016 was asked by Managing Partner to move personal practice to Lafayette, IN and start a scratch office.
- Elevated leadership development skills by attending leadership programs, participating in national leadership study groups, hiring performance coach, and earning CLF designation.
- Mastered time and stress management strategy by balancing leadership and personal production responsibilities.
- Inspired advisors by holding them accountable to their values, mission, and vision during coaching engagements.
- Consistently motivated advisors and helped them develop personal accountability while setting and enforcing clear performance expectations.
- Adopted system to monitor and manage my unit's goals.
- Leveraged support systems and shared resources to enhance unit productivity.
- Conducted career and development discussions including mentorship of successor leaders.
- Implemented various weekly & monthly coaching meetings focused on sales consulting, product training, mentorship, and accountability.
- Active faculty member delivering sales school training to all new advisors in the state.
- Regularly participated in and facilitated joint work relationships for advisors.
- Established sustainable referral sources while building referral culture within unit.
- Regularly recognized and rewarded successful sales and behaviors.
- Carried out supervisory responsibilities in accordance with organization's policies and applicable laws.
- Experience presenting to small and large groups through various speaking engagements covering financial literacy, leadership, entrepreneurship, sales, internships, and employer benefits.

Northwestern Mutual Life Insurance Company - College Unit Director
City, STATE • 05/2011 - 08/2014

- Responsible for recruiting, training, and developing 20+ college financial representatives through Northwestern Mutual's Nationally Recognized Top 10 Internship Program.
- Recognized as conversion leader

Northwestern Mutual Life Insurance Company - College Financial Representative/Team Captain
City, STATE • 06/2008 - 02/2010

- Learned how to build a financial services clientele and was top 5% of 3,500 college representatives nationwide.

LICENSES

Life & Health
Long Term Care
Annuities
FINRA Series 6
FINRA Series 63