

Robert Smith

Insurance Assistant/Consultant

CONTACT DETAILS

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PERSONAL STATEMENT

Seeking a position with a company that values dedication and personal growth of its employees; in return allowing to expand on knowledge and skills enabling to make a positive contribution to the company.

WORK EXPERIENCE

Insurance Assistant/Consultant

ABC Corporation - 1997 - 2000

Responsibilities:

- Evaluated leads obtained through direct referrals, lead databases and cold calling.
- Met with many existing and prospective clients each week to select appropriate insurance policies.
- Finalized sales and collected necessary deposits.
- Met with prospective customers and business owners in their homes, businesses and other settings.
- Implemented improvements in manual and electronic billing procedures.
- Reported policy changes and company conditions affecting customer satisfaction.
- Politely assisted customers in person and via telephone.

Insurance Assistant

ABC Corporation - 1992 - 1997

Responsibilities:

- Provided extensive administrative and clerical assistance to Insurance customers in a fast paced working environment.
- Compiled and sorted change endorsements and insurance agreements utilizing File Maker Pro, Progressive ProRater Plus, Dairyland Direct Connect, MD AIC Rater, and GMAC Web Credit, Stones General Insurances latest computed-based, company reporting software.
- Verified and posted details of business transactions, such as funds received and disbursed utilizing Microsoft Excel and Choices v 6.5.
- Received full payments and down payments from customers and wrote payment receipts, computed payment amounts utilizing company financial software.
- Filed records and reports that were no longer being used by the staff, and used the computer to maintain current business records and reports.
- Assisted in training new Assistants as directed by management..
- This is Dummy Description data, Replace with job description relevant to your current role.

SKILLS

Mortgage Loan Officer,
Loan Processor, Escrow
Branch Manager and
Marketing, Real Estate
Sales.

LANGUAGES

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

INTERESTS

Climbing
Snowboarding
Cooking
Reading

REFERENCES

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

Education

High School Diploma in Fashion Marketing - (General Douglas Mac
Arthur High School - Levittown, NY)