

# Robert Smith

## *Business Development Officer III*

### PERSONAL STATEMENT

An experienced Financial Advisor and Account Manager looking to transition from the Financial Services Industry to the Employee Benefits or Human Resources field. Considerable experiences to offer including pension sales and management, employee education and servicing, life and health insurance, and account management.

### WORK EXPERIENCE

#### ***Business Development Officer III***

**ABC Corporation - July 2011 - October 2011**

##### *Responsibilities:*

- Responsible for Business Development with one of the largest independent broker dealers firms in the U.S.
- Primary duties included providing comprehensive sales support for the firm in the areas of General Securities, Life and Health Insurance, Annuities, Qualified Retirement Plans.
- Provided comprehensive product and sales training to Regional Managers, Sales Representative, Brokers, and Agents in order to increase sales and revenue.
- Assisted the firm in reaching its sales and revenue goals by supporting vendor partners with the promotion of their current products and sales strategies to the field.
- Developed a Qualified Retirement Plan training program for financial advisors which consisted of 401(k), 403(b), 457, and Non-Qualified Retirement modules.
- Created content and measurable results while enlisting recognized industry leaders for participation in the programs.
- Created and Hosted a national bi monthly sales call for the field on various financial and insurance topics.

#### ***Business Development Officer***

**Stewart Title Company - 2006 - 2011**

##### *Responsibilities:*

- - Increase profit, revenue and market share by influencing new business across all customer segments.
- Consistently maintain a well-known presence within the regional real estate network of customers by attending and supporting industry-related events, host trainings, productively networking and making frequent office/ site visits to prospective and current customers.
- Actively cross-sell mix of solution-based products and services.
- Proactively anticipate and solve problems between customers and departments.
- -Immediate impact brought to the sales and operations teams through existing and new business sources and opportunities.
- Skills Used Utilizing a consultative sales approach including listening to and identifying customers needs and wants into realistic, measurable successes.

### **CONTACT DETAILS**

1737 Marshville Road,  
Alabama  
(123)-456-7899  
info@qwikresume.com  
[www.qwikresume.com](http://www.qwikresume.com)

### **SKILLS**

CA Life And Health  
License.

### **LANGUAGES**

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

### **INTERESTS**

Climbing  
Snowboarding  
Cooking  
Reading

### **REFERENCES**

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

- Offering selective products, services and resources to serve the immediate needs of customers resulting in more effective and efficient sales process..

## Education

MBA in Business Administration - (University of California - Los Angeles, CA)