

# ROBERT SMITH

## Jr. Insurance Assistant

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### SUMMARY

Dedicated and highly organized with the initiative to work creatively to identify and solve problems. Effective skills with experience in training, mentoring, motivating and assisting coworkers. Excellent communication skills with a propensity to work in a team environment.

### SKILLS

Type 37 wpm.

### WORK EXPERIENCE

#### Jr. Insurance Assistant

ABC Corporation - June 2004 – 2006

- Prepare presentations and documents using MS PowerPoint and Word.
- Prepare documents for invoicing various lines of coverage, for transmitting invoices to clients.
- Maintain client contact for premium payments.
- Responsible for tracking binder policies, resolving billing issues, corresponding with clients, relaying Notice of Cancellation from carriers.
- Perform follow up for binder extensions, policies, and endorsements.
- Coordinate and schedule meetings, including catering arrangements, securing conference rooms and special equipment as well as ground transportation.
- Received and processed payments, notified customers of past and present bills.

#### Insurance Assistant

ABC Corporation - 2001 – 2004

- Creating new insurance policies in various systems (eCLIQ, Comline, CCS, etc.) Maintaining and updating small commercial accounts in various databases Tracked inventory to meet service levels for policy production Administrative support duties including.
- Made outbound calls FQ/RTD.
- Removed blocks from debit cards.
- Placed blocks on Debits cards only if its fraud on the card holders account .Review transactions with the cardholder to determine if its fraud on the account.
- Transfer calls if needed to get transfer to a different FI agent.
- SAS is a software that we use.
- DIRECT is a software that we use ISSUER DIRECT is a software that we used .Monitoring Accounts for Capital One Bank.

### SCHOLASTICS

- Planning - (San Francisco State College)