

Anita Williams

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Summary of Skills and Qualifications:

- Proficient in MS Office Programs to include Word, Excel, Outlook & Works
- Applied, Tam 12, JD Edwards, Query
- Versatility in adapting to ever changing situations and environments
- High level of problem solving skills when dealing with persons of varied socioeconomic and cultural backgrounds
- Exceptional organizational/planning and multi-tasking skills

Work History:

Pacific Unified Insurance

01/2015 to Present

Processing all billing statements for benefit programs
Verifying all bills are accurate
Processing benefit enrollment forms and any benefit concerns
Prepare annual FSA testing
Process claims and prepare appeal letters for employees
Prepare annual cost for health plans W-2 reporting
Process enrollments for Group policies
Terminate all individuals on group policies
Answer heavy volume of calls
Process changes to individual and group policies

American Senior Benefits.

Insurance Agent
Corona, CA

01/2013 - 11/2014

Responsible for re-selling individual medical plans to existing members in Ca.
Responsible for increasing member retention (decrease in lapse rates) by working with at-risk members.
Presenting and explaining insurance policy options based upon prospective clients' needs.
Setting appointments with prospective insurance customers and meeting with individuals in their homes to write new life insurance policies.
Prospecting for new business from referrals, networking, marketing, and leads from previous clients.
Natural ability to convert phone conversations in to sale.

United Insurance
Insurance agent
San Bernardino, Ca

05/2012 - 12/2013

Solicit and write new P&C policies from both inside and outside the book of business
Thoroughly understands and follows all underwriting and rating plans
Ensures that all required documents are signed, filed and faxed (when required) appropriately.
Follows consistent sales process for all prospects for prescreening, quoting, sales track application completion and follow up.
Maintains knowledge of new products.
Maintains a sales record each week and provides a copy to the staff manager
Sales quota \$75.00 weekly
One of 3 top sales performers in office.

TLC Staffing
Customer Service (Lowes Call Center)
Ontario, Ca

11/2011-05/2012

Answered calls from lowe's stores nationwide regarding shipping of merchandise.
Update log sheet in excel when drivers calls in regarding shipments, or delays.
Calls Store manager twice daily to receive lowe's shipments for next.
Speak with customer's regarding time frames and concerns they may have with merchandise.
Upheld highest level of customer service.

Real Estate Plus
Property Manager/Customer Service
Rancho Cucamonga, Ca

04/ 2009- 09/2011

Professionally represent the company while adhering to the terms and conditions of the management agreement.
Maintain a current assessment of property management procedures.
Initiate and distribute timely reports to owners on financial, marketing and maintenance information.
Manage and coordinate day-to-day financial transactions including: accounts receivable, accounts payable, collection of all rents and up-to-date maintenance of required financial records and files.
Conduct and process property inspections on a quarterly basis and prepare inspection reports.
Initiate, contract and administer all necessary services to maintain and enhance value, the operating efficiency and physical appearance of the property.
Maintain ongoing tenant contact/relations program to constantly assess needs and assure problems are being addressed promptly to the satisfaction of tenants and owners.

Pacific West Real Estate & Investment

03/ 2005-11/2008

**Owner/Customer Service
San Bernardino, Ca**

My responsibilities included all aspects of Ownership/Human Resources. My duties were to manage the recruitment, hiring, and promotional functions; arrange and authorize pre-employment drug screenings; conduct salary surveys.

Managed a total of 10 employees.

Pre qualify clients for finance to acquire property.

Price interest rates with lenders to acquire the lowest rate when purchasing real property.

Make sure all documents and forms are in guidelines with DRE upon closing.

M Block & Sons

06/2002-11/2004

**Customer Service
Ontario, Ca**

Answers all incoming phone, fax and in person inquiries from customers in reference to products purchased.

Process all customers orders and returns (RMA's)

Refer unresolved customer grievances to designated departments for further investigation.

Determine charges for services requested, collect deposits or payments, or arrange for billing

Manage client communications, shipping notifications and updates

Interfaces with shipping department in identifying cause and effect of product returns

SW Hardware

04/2000-05/2012

Buyer

San Bernardino, Ca

My responsibilities were to purchase selective types of metals used in equipment hardware, seals gaskets, aluminums establish vendor accounts, negotiate and compare prices, and to process requisitions.

Training & Certificates:

**International Real Estate School
Real Estate License**

Upland, Ca

**Southwest Jr College
Certificate: Billing**

Los Angeles, Ca

**Mike Russ School
Insurance license
Life and Health
Property casualty.**

Upland, Ca

References upon Request