

# Saad M. Rassam

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## Work Experience

### **Allstate Ivantage**

*Property and Casualty Producer 04/2018-Present*

Qualifies business owner insurance leads from the Northeast territory and determines suitable insurance products to place. Utilizes multiple selling platforms to quote, underwrite, and close business. Creates best practices for daily operations and relationship management. Partners with agents, carriers, and technology programs to deliver an efficient sales and service model. Property and Casualty Licensed.

### **Paychex**

*Property and Casualty Representative - 09/2017-02-/2018*

Drove the sale of commercial insurance products including worker's compensation, businessowners' policies, commercial automotive, and general liability for small and midmarket clients. Generated quotes through multiple carriers to deliver competitive rates. Regularly met or exceeded goals by managing an active pipeline.

*Health and Benefits-Cobra Specialist- 08/2016-09/2017*

Provided internal support for account managers and major field agents on midmarket accounts and cross sale opportunities. Worked with multiple carriers to handle day to day operations and processed enrollments and terminations for Cobra participants. Resolved service issues with both internal and external customers.

### **Canandaigua National Bank**

*Financial Services Representative Cross Trained Teller -04/2015-08/2016*

Built relationships with prospective and existing customers. Identified the needs of bank clientele and educated them on suitable products. Accurately followed new account opening procedures and recognized appropriate referral opportunities to personal bankers, wealth managers, lenders, and trust officers.

### **Garber Honda /John Holtz Honda**

*Service Advisor - 07/2010-04/2015*

Advised customers about vehicle condition, services needed, and ongoing maintenance issues. Managed technician's work load, dispatched work based on technician's abilities, coordinated services in a timely manner. Exceeded customer's expectations, earned repeat business, and efficiently used company resources.

## Skills and Certifications

- NC Property and Casualty Agent Number 1487808
- Driven to consistently hit departmental goals
- Strong organizational skills, schedule and workload management
- Graduate of Outward Bound Leadership Program
- Integrity Service Training
- Toastmasters Competent Communicator
- Proficient in MS Office and CRM software

## Education

### **Health Coach Institute**

*Behavior Health Coach Program 09/16-07/2017*

Studied nutritional theories and behavioral psychological concepts. Gained understanding of common issues and how to overcome deep seeded habits and personal beliefs that hold people back from achieving personal goals. Utilized exploratory questions and leading clients to positive outcomes in multiple areas of their lives.

### **University of Florida Gainesville, FL**

*Bachelor of Science, Anthropology 06/2005-06/2008*

Completed coursework to understand people and cultures to better interact in a multicultural world. Studied social, political, economic, and environmental systems within cultures.