**Barb Kenneth**

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**Professional Experience**

**Licensing and Administrative Assistant ∙ Confidential ∙ Portland, OR (9/2012-Present)**

* Manage and maintain agency & producer licensing database including carrier and state appointments.
* Manage and track agency state licensing renewals; coordinating data to comply with individual state requirements.
* Process all entity and producer license renewals through the NIPR (National Insurance Producer Registry).
* Research and confirm continuing education compliance for licensed producers.
* Gather agency’s financial and production information for agency contracting.
* Communicate, track and ensure timely appointments to ensure minimal commission discrepancies.
* Obtain producer profile and background history to process and obtain new licenses, as needed.
* Complete, track and process entity registrations and filings in states where applicable.
* Maintain agency and producer confidentiality in observance of privacy regulations.
* Initiate, process and track entity terminations and cancellations.
* Create PowerPoint slide presentations for quarterly agency meetings.

**Client Services Representative ∙ Patrick J. Thomas Insurance Agency ∙ Minneapolis, MN (6/2011-7/2012)**

* Managed all commercial and personal lines insurance policies including new quotes and renewals.
* Compared, verified and ensured adequate coverage while processing endorsements as needed.
* Processed AP & AR for all policies including endorsements and processed monthly aged receivables reports.
* Promptly issued certificates of insurance for commercial lines clients.
* Maintained positive business relationships with insurance carriers, clients, agents and staff.
* Sorted, filed and managed online file maintenance while organizing and following through on special projects.

**Office Manager ∙ James Biever Construction ∙ Bend, OR (4/1999-4/2011)**

* Completed all administrative and clerical duties for construction general contractor.
* Regularly communicated with contractors and sub-contractors pertaining to residential and commercial projects.
* Completed RFQs for new projects and change orders, as needed.
* Handled and processed all AP & AR.
* Responded to requests providing proof of license, bonding and insurance coverage.

**Sales Assistant ∙ US Bancorp Investments & Insurance Inc. ∙ Bend, OR (3/2001-8/2005)**

* Provided sales, processing, operational, administration and client service support for the region including multiple Consultants and sales staff in multiple branch locations.
* Functioned as liaison and key point of contact to the executive team, sales staff and multiple branch departments.
* Integral in assisting Financial Consultant achieve company’s 11th highest producer.
* Promoted sales, processed and tracked financial documents and applications for new and existing clients.
* Processed and tracked all investment deposits, fund transfers and account changes.
* Researched and handled confidential service issues while escalating more critical issues to executives, as needed.
* Composed and managed client correspondence, prepared and maintained spreadsheets and handled all regional sales tracking and reporting.
* Monitored client suitability documentation and ensured regulatory compliance standards and practices.
* Reception and first line of client contact for multiple consultants.

**Computer Skills**

Outlook 2010, MS Office Suite, OneApp Agency, Lotus Notes, Applied Systems (TAM), Redtail CRM, ACT CRM, Laser App forms processing, BNI referral tracking and maintenance, website development, calendar management, multi-line phone systems, reception duties, data-entry and 10-key by touch.

**Education**

**Southern Oregon University, Ashland, Oregon 1991-1993**: Undergraduate coursework.