**Richard Coker**

**8 Linda Street**

**West Haven, CT 06516**

**Phone: (203) 561-7844**

**Coker.22@hotmail.com**



**EDUCATION:**

**University of Hartford, West Hartford, CT**

***Bachelor Degree of Business Administration,***

***NASD series 6, 63 and CO Life & Health Insurance Licenses***

**HIGHLIGHTS OF QUALIFICATIONS:**

 More than 3 years of hands-on sales experience specializing in retirement plans.

 Increased sales of the Northeast Region by 25% within a 6 month timeframe while with Fast 401K.

 Possess excellent communication skills to address the needs of clients and business managers.

 Team player committed to performance excellence and continuous improvement.

 Highly proficient in Microsoft Office Suite 2003 and 2007: MS Word, Excel, PowerPoint and Outlook.

 Ability to learn quickly, make effective decisions, keen instincts for problem resolution as an effective team member.

 Excellent time management, prioritizing, multi-tasking and organization skills at all levels.

**PROFESSIONAL WORK EXPERIENCE**

**Eplan Services, Inc, Greenwood Village, CO**  *11/*2008 - 7/2009

***Internal Wholesaler***

 Sold Safe Harbor Plans, Traditional, SEP IRAs to general public specializing in retirement plans (401K, 403B, 457 and IRA Plans).

 Met and exceeded sales goals for the Northeast Region by 15% while coordinating efforts with field wholesaler by conducting final meetings and scheduling appointments with new prospects.

 Managed and cultivated new and existing relationships with all major alliances and financial firms within the Northeast Region.

 Conducted proactive sales campaigns by conducting outbound calls, group conference calls, promoting business building and prospecting ideas.

 Supported upper management in efforts to streamline business efficiency, profitability and assisted with advice on client segmentation.

**Great West Life, Greenwood Village, CO** 11/2006 - 6/2008

***Internal Wholesaler***

 Developed new business within territory by calling new dealers: provided sales and marketing information to prospects.

 Conducted 400 outbound calls per month in order to generate leads.

 Maintained contact with financial intermediaries from banks annuities, life insurance plans and updated them on products.

 Reviewed and analyzed sales monthly, quarterly and annually.

 Maintained territorial database while updating files on competitive products.

 Developed a plan of action to address issues and increase sales.

 Provided excellent customer service: handled requests for information, hypothetical illustrations, sales and marketing materials.

**AXA Equitable,** **Secaucus, NJ** 11/2004 - 6/2006

***Client Service Representative***

 Answered 50+ inbound calls from annuity accumulator clients, and registered representatives and their administrative staff.

 Provided support and better service levels to clients who no longer had a primary relationship with a field representative.

 Researched and collaborated with other business units to resolve caller inquiries in a timely and efficient manner.

 Provided accurate information regarding AXA Broker Dealer products and services.

 Maintained a high level of service at all times in a demanding and high-pressure environment.

**ING Life & Annuity, Hartford, CT**  04/2003 - 11/2004

**Customer Contact Center Representative**

* Specialized in retirement plans (401K, 403B, 457, and IRA Plans) and provided detailed product information and education to all major alliances within sales territory.
* Managed and maintained relationships with all major alliances and financial planning firms in the Northeast region
* Prepared and designed plan parameters on all requests for proposals generated and issued regarding retirement plans.
* Increased sales of the Northeast region by 25% within a 6 month time frame
* Coordinated efforts with field wholesaler by conducting final meetings and scheduling appointments with new prospects.

**TIAA-CREF,** **White Plains, NY**

**Tuition Financing Specialist**  09/2002- 03/2003

* Provided high quality college savings program and financial counseling services in a sales environment.
* Communicated details of Tiaa-Cref 529 College Savings Program, after-tax investments and insurance products, payment flexibility, investment choices, and overall retirement issues to individual institutional and prospective participants.
* Developed Excellence In Sales training course

**Manulife Wood Logan, Stamford, CT** 07/2000- 04/2002

**Internal Wholesaler**

* Develop new business within assigned territories by providing telephonic sales support to Brokers, Advisors, Agents and Wholesalers.  This includes providing detailed product information, competitive analysis, suggested product positioning, all aspects of marketing information, and real time sales assistance to Brokers and their clients.
* Maintain reactive and proactive contact with brokers from all channels to provide timely and often time sensitive product, marketing, and regulatory updates.
* Efficiently manage large volumes of incoming phone calls along with an aggressive schedule of outgoing communication campaigns. This includes responding to sales illustration requests, hypothetical illustration alternatives, marketing literature requests, basic and advanced case consultation, and problem resolution in a professional and timely manner.
* Internal Wholesalers are expected to create and maintain proactive sales relationships with key firms in the territory by proposing and implementing dynamic communication campaigns within their territory in order to expand sales within existing firms and develop sales in new relationships.
* A detailed grasp of sales, product, marketing, and regulatory requirements is essential in order to provide state of the industry sales support. .
* Maintain a close working relationship with assigned Wholesalers and Regional Vice Presidents while providing professional sales support as needed, to all, which can include a daily activity review, end of day voicemail or e-mail market-wrap discussions.