

JASON B. SHROOT

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CORE LEADERSHIP SKILLS

Results Driven
Marketing Guru
Consultative Selling
Exceptionally Organized

Strong Closer
Quick Learner
Analytical Thinker
Efficient Sales Trainer

Ambitious
Highly Ethical
Leadership Expertise
ENTJ Personality Type

EDUCATIONAL EXPERIENCE

- ❖ PEPPERDINE UNIVERSITY, GRAZIADIO SCHOOL OF BUSINESS & MANAGEMENT
Masters of Science in Management & Leadership (MS) August 2011
Malibu, CA
 - ❖ UNIVERSITY OF MARYLAND AT COLLEGE PARK
Bachelors of Arts in Political Science (BA) May 2001
College Park, MD
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PROFESSIONAL EXPERIENCE

ARMED FORCES BENEFIT ASSOCIATION / 5 STAR LIFE INSURANCE
Sales Account Manager

Dec 2013-Present
Alexandria, VA

- ❖ Specialized in the company's portfolio of individual and group life, disability, critical illness and accidental insurance products – Specializing within the Government, Military, First Responders and Employee Benefits (Group/Worksite) sectors.
- ❖ Maintain and promote existing account relationships with insurance agents and their support staff.
- ❖ Provided training, risk assessments and marketing support to the company's insurance agents.
- ❖ Aided with the review of pending applications, and handled the underwriting aspects of applications.
- ❖ Completed the initial rate pricings and formal proposals for employee benefits presentations.
- ❖ Served on various managerial projects including testing and development of new company tools and resources.

DIVERSIFIED FINANCIAL SERVICES
Insurance Agent

2010-2013

- ❖ Provided personal & commercial lines insurance policies to consumer and business clients.
- ❖ Offered advice to clients on risk management and assisted them to develop ways to minimize risk exposure.
- ❖ Fulfilled initial underwriting of insurance applications to ensure proper guidelines were being satisfied.
- ❖ Developed marketing strategies with a focus on online social media to generate prospects and engage existing clientele.
- ❖ Insurance Carrier Experience: Allied, Chartis, Chubb, CIG, CNA, Genworth, Golden Eagle, Hartford, Mercury, Metlife, Nationwide, Progressive, Safeco, Travelers, Zurich.

FARMERS INSURANCE
Insurance Agent

2008- 2010

- ❖ Collected information from prospects and assessed their insurance needs.
- ❖ Customized insurance programs to suit individuals and business clients, often covering a variety of risks.
- ❖ Directed various marketing and networking events to establish relationships with prospects and clients.
- ❖ Evaluated, educated and recommended appropriate levels of coverage needed based on a client's risk exposure.

MILLENNIA MORTGAGE
Senior Loan Officer

2003-2008

- ❖ Prepared mortgage loan programs that best represented homeowners', from A-Paper, Alt-A, and Non-Prime, to Conforming and Jumbo sized loan products
- ❖ Negotiated mortgage loan rate pricing and performed initial loan underwriting and assessments based on a financial needs analysis.
- ❖ Launched the company's Client Retention Department, which acted as a filter recovering prospects that had yet to accept a loan officer's original sales offer.
- ❖ Supervised a team of loan officers' training & daily operations regarding loan pricing sales techniques, and customer service.
- ❖ Top 5% sales producer out of 180 loan agents.

UBS
Financial Advisor

2001- 2003

- ❖ Adept in analyzing, educating, developing, and executing short-term and long term financial needs analysis.
- ❖ Formulated and executed business development and marketing strategies to attract and acquire new clients.
- ❖ Communicated with sell-side analysts and company management in accessing market and economic trends.

PROFESSIONAL LICENSES

- ❖ Insurance Agent (Property & Causality, Long-Term Care, Health, & Life)
- ❖ Personal Lines Coverage Specialists (PLCS) – National Underwriters
- ❖ Customer Service Associate (ACS) – LOMA
- ❖ LOMA – Level 1 Certificate
- ❖ Notary Public
- ❖ Mortgage Loan Originator (NMLS #1521083)
- ❖ Real Estate Salesperson
- ❖ NASD Investment Advisor (Series 7 & 66) – *Inactive*
- ❖ Certified SPIN Selling Sales Methodology

Dear Employer:

I am highly motivated and an enthusiastic self-starter who has the ability, and drive to make a significant contribution to your firm. I am seeking a full-time position with a salary of \$55,000 plus bonuses/commissions, in which I can apply my expertise and educational background as well as enter into a position gaining valuable knowledge and talents. To such an organization, I am confident that I could bring:

- Strong leadership qualities.
- Ability to generate fresh ideas and creative solutions.
- Intense desires to do an outstanding job in anything that I undertake.
- Ability to successfully manage many projects at the same time.
- Reliability and a strong work ethic.
- Excellent interpersonal skills.

I would like very much to schedule an interview where we can discuss in person my eagerness and qualifications for a position with your prestigious organization. Thank you for your consideration, and I look forward to hearing from you soon.

Regards,

Jason Shroot
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jshroot@msn.com