JASON B. SHROOT
Phone: 301.502.1769 | Email: JShroot@msn.com

Core Leadership Skills

Results Driven	Strong Closer	Ambitious
Marketing Guru	Quick Learner	Highly Ethical
Consultative Selling	Analytical Thinker	Leadership Expertise
Exceptionally Organized	Efficient Sales Trainer	ENTJ Personality Type

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Educational Experience

❖ **PEPPERDINE UNIVERSITY, GRAZIADIO SCHOOL OF BUSINESS & MANAGEMENT** — August 2011
  Masters of Science in Management & Leadership (MS) — Malibu, CA

❖ **UNIVERSITY OF MARYLAND AT COLLEGE PARK** — May 2001
  Bachelors of Arts in Political Science (BA) — College Park, MD

Professional Experience

ARMED FORCES BENEFIT ASSOCATION / 5 STAR LIFE INSURANCE — Dec 2013-Present
Sales Account Manager — 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 — 2010-2013
Insurance Agent

❖ 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   2008- 2010
Insurance Agent

- ❖ 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   2003-2008
Senior Loan Officer

- ❖ 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   2001- 2003
Financial Advisor

- ❖ 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