
PHILLIP STANKEY

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Summary

Financial Services professional with 18 years experience in a wire house setting and eight years experience in P&C claims and marketing

Skills

- Proven ability to work independently
- Proven ability to build and maintain profitable relationships in retail and B2B setting.
- I take a detail oriented and extremely thorough approach to managing my territory
- Currently hold series 7, 63 and 65 Securities licenses
- Extensive experience with Microsoft Office Suite
- Experience with multiple CRM's

Experience

- 08/2017 - Current
Toledo Museum of Art
Protective Services Associate
 - Patrol assigned galleries to assist visitors and maintain the physical integrity of the museum's art collection.
 - Promoted to Protective Services officer in 11/2018.
 - Became responsible for greeting and assessing all visitors entering the facility through my post for possible threats to the Museum's visitors, staff and art collection.
- 12/2008 - 01/2018
Morgan Stanley
Toledo, Ohio
Sr Registered Client Associate
 - Junior partner on a three person team
 - I Provided investment advice to clients and completed transactions when appropriate.
 - I also designed and implemented marketing and prospecting strategies and materials.
 - I managed incoming call flow and appointment scheduling
 - Assisted with the movement of 80% of a 75,000,000 book of business over from Merrill Lynch within an eight-day timeframe.
- 01/2000 - 12/2008
Merrill Lynch
Toledo, Ohio
Financial Advisor
 - Working as the junior partner on five person team, I redesigned workflow and developed and implemented our marketing program.
 - I supervised the clerical staff and trained them on the use and upkeep of our client and prospect database.
 - I designed and implement our marketing strategies and materials.
 - I met with clients and made appropriate changes to their investment portfolios as needed
 - Team production increased from @\$350,000 to over \$500,000 during the first two years of my tenure.
- 04/1999 - 02/2000
Reliance Insurance
Toledo, Ohio
Territory Manager
 - I was responsible for recruiting, appointing and training Independent Insurance agents throughout NW Ohio.
 - Marketed our Non-Standard and Middle Market Auto products as well as Personal Watercraft and

Motorcycles to these agents.

- Grew agency force by 25% while maintaining a profitable loss ratio of @ 50.
- Built and maintained database of current, prospective and former agents within the territory including their use of our products and those of our competitors.
- Worked closely with internal policy services and claims reps to address any service issues within the agent force.
- Closely monitored our competitors for any policy or product changes they made and communicated them to our product managers

• 11/1998 - 04/1999
Integon Insurance
Toledo, Ohio

Territory Manager

- Appointed group of Independent Insurance agents throughout Northern Ohio.
- Marketed our Non Standard and Middle Market auto products along with light commercial vehicle and motorcycles insurance Grew agency force by 30% and written premium by 25%
- Maintained accurate, up to date records of all contacts with current and prospective agents.
- Communicated any and all changes in the territory that affected our competitive posture to sales and product managers

• 02/1998 - 11/1998
Leader National
Insurance
Toledo, Ohio

Territory Marketing Manager

- Recruited and appointed new Independent agents and cultivated relationships with previously appointed agents across Ohio and SE Michigan.
- Grew agency force in territory while company experienced a decline in written premium throughout the state of Ohio.
- Stayed abreast of regulatory changes in the States of Ohio and Michigan
- Maintained knowledge of competitors including changes to their rates and underwriting practices

• 04/1996 - 02/1998
Allstate Insurance
Toledo, Ohio

Sr Claims rep

- Managed claims office at local salvage yard.
- Negotiated and settled all total loss auto claims within Toledo Claims territory.
- Worked closely with administrative assistants to expedite final disposition of automobile salvage acquired within the claims process

• 07/1990 - 01/1994
Progressive
Insurance
Toledo, Ohio

Claims Rep

- Estimated and settled vehicle damage and bodily injury claims.
- Responsible for investigating facts of loss, determining coverage and negotiating settlements with insureds, claimants and their legal representatives.
- Stayed abreast of changes to our policy as well as any legal precedents that would alter my handling of claims in my territory

Education and Training

• **BA** in English

Bowling Green State University

Graduated with honors. I paid for 100% of educational expenses through various part time year round jobs

Activities and Honors

Assisted spouse in establishing and maintaining a ministry for widows in our church.

Active volunteer in the Bedford, MI HS band boosters