Marianna McCue

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Summary
Dynamic professional with over 10 years of experience in the financial and insurance sectors, specializing in administration, customer service, sales, and technical support for insurance software. Currently pursuing a Software Engineering Technician program through Centennial College to pivot into technology while leveraging extensive expertise in finance and insurance. Committed to integrating industry knowledge with new technical skills to drive effective solutions and enhance business operations.

Work Experience

Associate Financial Advisor
The Co-operators - St. Thomas, ON
September 2022 to April 2024

- Fueled agency growth through the strategic sales of life and wealth management products, consistently exceeding sales targets.
- Conducted proactive client reviews and effectively cross-sold insurance solutions across various lines of business, enhancing client satisfaction.
- Implemented front-line risk assessments and ensured compliance with underwriting guidelines, contributing to a robust agency reputation.
- Resolved client inquiries and complaints efficiently, improving overall client retention and service quality.

Licensed Client Services Administrator
Action Financial Group Ltd. - St. Thomas, ON
July 2019 to September 2022

- Supported Financial Advisors with reports, client inquiries, and account maintenance, utilizing systems such as Maximizer, Croesus, MyPortfolio+, Client Portal, and Microsoft Office.
- Processed transactions for investment portfolios (Stocks, Mutual Funds, ETFs, etc.).

Business Development Agent
Allstate Insurance - London, ON
October 2017 to July 2019

- Generated new business for Home & Auto Insurance through proactive prospecting, including cold calling, networking, and attending trade shows.
- Consistently achieved individual and team sales targets, contributing to overall agency success.

Associate Financial Advisor
The Co-operators - Brent Mockler & Associates - London, ON
November 2016 to October 2017

- Drove profitable growth through the strategic sale of life, group, and wealth management products, exceeding individual sales goals.
- Conducted comprehensive client reviews and needs analyses, effectively cross-selling insurance solutions while ensuring regulatory compliance.
- Developed targeted marketing plans and built strong client relationships to enhance agency visibility and client retention.

Financial Services Representative
CIBC - Guelph/London, ON
March 2016 to November 2016

- Delivered tailored financial solutions to personal and small business clients, enhancing client satisfaction and driving sales growth.
- Proactively identified client needs through outreach, effectively scheduling consultations to explore opportunities.
- Advised clients on comprehensive financial planning, including cash management, credit, investment, and wealth protection, resulting in improved client engagement.
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Office Manager
Complete Wellness Chiropractic Clinic - Guelph, ON
January 2015 to March 2016

- Fostered strong client relationships through effective communication and appointment scheduling, managing over 50 client follow-ups daily.
- Ensured accurate invoicing and maintained comprehensive medical records, enhancing operational efficiency.
- Developed and managed the clinic's business website for improved client engagement.

International Travel Consultant
Flight Centre - Toronto, ON
June 2013 to February 2014

- Consulted with clients to provide tailored travel solutions and organized all travel logistics, including flights and accommodations.

- Built and maintained strong client relationships through proactive follow-ups, driving repeat business and loyalty.
- Achieved sales targets by delivering creative solutions for complex travel needs while managing profit and loss effectively.

Business Development Consultant
Modis - Toronto, ON
January 2013 to June 2013

- Delivered IT services and solutions to Retail, Marketing, and Supply Chain clients through targeted cold calling and presentations.
- Engaged with senior management to introduce Modis' offerings, ensuring project delivery on time and on budget.
- Developed strong client relationships, enhancing customer loyalty and supporting various placement strategies.

Licensed Insurance Broker & Customer Advocate
HB Group Insurance - The Co-operators Group - Mississauga, ON
May 2008 to December 2012

- Top Sales Producer in 2011 among 200+ representatives; consistently ranked in the Top 10 monthly, demonstrating exceptional sales acumen and product knowledge.
- Provided exceptional service for home, auto, and travel policies, ensuring a 24-hour turnaround for new business quotes.
- Built strong client relationships through personalized product education, enhancing retention and loyalty.
- Resolved customer complaints efficiently, escalating issues as needed to ensure prompt resolution.

Customer Sales & Service Associate
The Co-operators Group - Guelph, ON
November 2009 to March 2010

- Delivered exceptional customer service by leveraging in-depth product knowledge, ensuring client satisfaction and retention.
- Achieved sales targets by effectively selling and servicing insurance products, streamlining payment processing for clients.
- Expanded client base through targeted cold calling and persuasive sales presentations.

Systems Operations Support Representative
The Co-operators Group - Guelph, ON
May 2008 to November 2009

- Developed comprehensive knowledge of company systems, serving as a critical resource for technical support across the organization.
- Delivered expert technical assistance to agents nationwide, enhancing operational efficiency and productivity.
- Facilitated training sessions for new agents through phone conferences, ensuring proficient mastery of systems and tools.
- Consistently recognized as a top performer for quality, accuracy, and call volume, demonstrating a strong commitment to exceptional client service.

Education

Software Engineering Technician Diploma
Centennial College - Scarborough, ON
September 2024 to December 2025 (Future Graduation Date)

Business Management Administration Diploma
Conestoga College - Kitchener, ON
2006 to 2008

Certifications & Licenses

- Canadian Securities Course (December 2019)
- Conduct and Practices Handbook Course (CPH) (December 2019)
- LLQP (February 2017)
- OTL Insurance License (November 2016)
- Investment Funds in Canada (March 2016)
- RIBO (March 2012)
- TEFL/TESOL Certification, Intesol Costa Rica (2014)