

## Resumagic.com Sample Resume: Entrepreneur / Financial Services

### John Smith

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#### PROFESSIONAL PROFILE

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Thirty years experience as insurance / securities consultant and business owner. Entrepreneur who grew three financial consulting businesses from start-up to millions in annual sales through effective business planning, creative sales techniques, and innovative marketing.

#### PROFESSIONAL EXPERIENCE

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NAME OF COMPANY, City, ST 1992 to 2003  
**Founder and Former President**

*[An agency providing financial planning, asset management, employee benefits, and quality insurance products to 400 clients. Sold company to XXX Corporation 11/14/2003 at a substantial profit.]*

- Marketed and sold a full range of financial products including life insurance, property and casualty insurance, mutual funds and annuities.
- Provided assistance to businesses and individuals seeking to supplement existing benefit plans; coordinate financial planning focused on comfortable retirement programs
- Consistently maintained a high-standard performance record via exceptional service, follow-through, and specific attention to detail which resulted in higher sales
- Analyzed complex situations, designed practical solutions, and implemented cost-effective plans
- Developed personnel, motivated staff to exceed goals, and improved production and sales

NAME OF COMPANY, City, ST 1982 to 1991  
**Branch Manager**

*[A mid-sized company offering financial services to businesses and citizens in the Midwest.]*

- Directed all branch activities and supervised X employees while focusing on providing sales and service of insurance and securities products
- Analyzed insurance company products, services and stability in the market place
- Successfully promoted products and services through effective sales seminars
- Consistently increased sales and maintained profitability each year

NAME OF COMPANY, City, ST 1975 to 1981  
**President and Founder**

*[Established firm offering "one stop" financial services. Sold business in 1981 to long-time manager at a significant profit. This company is now the largest P & C firm in Northeast.]*

- Grew business from the initial \$80,000 of property casualty premium to over \$1,500,000 in mainly commercial lines in first six years of operation
- Selected and hired self-motivated sales staff and trained them to be hard working, customer-focused and extremely educated in their field, enabling them to work with minimal day-to-day supervision
- Researched and analyzed the property casualty market and re-focused business in response to market changes, making sure firm always offered quality and competitive products from the best P & C carriers
- Always exceeded mandatory production levels required to maintain a branch contract in the securities business; earned membership in Million Dollar Round Table

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NAME OF COMPANY, City, ST  
**President and Founder**

1969 to 1975

*[A financial consulting firm specializing in life, disability, group, pensions, mutual funds and variable annuity sales.]*

- Marketed services and products, recruited personnel, trained consultants and managed marketing activities
- Established name recognition and generated sales through a combination of sales and marketing techniques including cold calling, corporate account development and judicious placement of advertising

## **EDUCATION**

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Bachelor of Science, Business Administration, (1966) NAME OF UNIVERSITY, City, ST

Professional Courses: Life Underwriters Training Council Fellow (LUTCF); completing pertinent sections of ChFC and CLU; and completed various business courses and seminars

## **LICENSES, HONORS and MEMBERSHIPS**

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Securities -- Series 7 (Registered Representative) & Series 24 (Registered Principal)

Insurance -- Life, Health, Variable Annuities

Life and Qualifying Member, Million Dollar Round Table

Member, [Name of City] Association of NAIFA

Past President, Anniston / Life Underwriters

Past Member, [Name of City] Rotary Club