

John Smith

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PROFESSIONAL PROFILE

Over 30 years experience as insurance / securities consultant and business owner. Expertise in areas ranging from business administration to marketing insurance/financial products and services to recruiting and training sales staff. Key Accomplishments:

- Entrepreneur who grew three businesses from start-up to millions in annual sales through effective business planning, creative sales techniques, and innovative marketing.
- Expert knowledge and skills in all facets of Life, Disability, Long Term Care, Payroll Deduction Accounts, Annuities, Group, Pensions and Securities Business.
- Recognized by clients and colleagues as a consummate professional with a high degree of personal integrity. Known for a contagious passion for excellence, a talent for resourceful business solutions, and a capacity for motivational leadership.
- Possess outstanding communication and presentation abilities. Effectively market tangible/intangible products and services; skilled in persuasive presentation and profitable negotiation. Offer excellent customer relations skills.

PROFESSIONAL EXPERIENCE

NAME OF COMPANY, City, ST
Founder and Former President

1992 to 2003

An agency serving more than 300 clients by providing financial planning, asset management, employee benefits, and quality insurance products. Management of firm has recently been assumed by daughter.

- 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
- Directed marketing efforts to promote visibility and introduce new products
- 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
Branch Manager

1982 to 1991

A mid-sized company offering financial services to businesses and citizens in the [name of region] region.

- 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
President and Founder

1975 to 1981

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 [Name of state].

- 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

NAME OF COMPANY, City, ST
President and Founder

1969 to 1975

An agency specializing in life, disability, group, pensions, mutual funds and variable annuity sales.

- Developed a profitable financial consulting firm and an effective consulting staff. Responsible for marketing services, recruiting personnel, training consultants and managing products
- 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

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
 Completed various business courses and seminars

LICENSES AND HONORS

Securities -- Series 7 (Registered Representative) & Series 24 (Registered Principal)
Insurance -- Life, Health, Variable Annuities
Life and Qualifying Member, Million Dollar Round Table

MEMBERSHIPS

Member, [Name of City] Association of NAIFA
Past President, Anniston / Life Underwriters
Past Member, [Name of City] Rotary Club
Past Board Member, [Name of County] Boy Scout Council