

Peter Smith

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PROFESSIONAL EXPERIENCE

ALLSTATE INSURANCE , New York, NY

Senior Insurance Sales Agent, Jul 2007 – present

- Customize insurance programs to suit individual customers, often covering a variety of risks.
- Ensure that policy requirements are fulfilled, including any necessary medical examinations and the completion of appropriate forms.
- Calculate premiums and establish payment method.
- Interview prospective clients to obtain data about their financial resources and needs, the physical condition of the person or property to be insured, and to discuss any existing coverage.
- Sell various types of insurance policies to businesses and individuals on behalf of insurance companies, including automobile, fire, life, property, medical and dental insurance or specialized policies such as marine, farm/crop, and medical malpractice.
- Inspect property, examining its general condition, type of construction, age, and other characteristics, to decide if it is a good insurance risk.
- Seek out new clients and develop clientele by networking to find new customers and generate lists of prospective clients.
- Perform administrative tasks, such as maintaining records and handling policy renewals.
- Explain features, advantages and disadvantages of various policies to promote sale of insurance plans.
- Call on policyholders to deliver and explain policy, to analyze insurance program and suggest additions or changes, or to change beneficiaries.

LIBERTY MUTUAL, New York, NY

Insurance Sales Agent, Jul 2004 – Jan 2007

- Confer with clients to obtain and provide information when claims are made on a policy.
- Develop marketing strategies to compete with other individuals or companies who sell insurance.
- Contact underwriter and submit forms to obtain binder coverage.
- Plan and oversee incorporation of insurance program into bookkeeping system of company.
- Select company that offers type of coverage requested by client to underwrite policy.
- Monitor insurance claims to ensure they are settled equitably for both the client and the insurer.

EDUCATION

Rockport Community College, Rockport, MA

Bachelor of Art in Business Administration, May 2004

- GPA: 3.2/4.0

ADDITIONAL SKILLS

- Customer relationship management CRM software — Allied Financial Software Act4Advisors
- Financial analysis software — Cygnus Software IncomeMax
- Enterprise resource planning ERP software — AMS Services AMS 360, Advantage Information Systems The Agency Advantage
- Proficient in Microsoft Office
- Fluent in Spanish