**Insurance Assistant Resume Sample**

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**Job Objective:**

Customer-oriented and highly efficient Insurance Assistant seeking a challenging position with 'ABC Insurance Corporation' to use my strong background and experience to achieve company targets, and provide excellent client satisfaction.

**Summary of Skills:**

* Comprehensive knowledge of various life insurance policies,
* Ability to understand clients' needs, and recommend insurance policies
* Adept at explaining features, advantages, and rules to customers
* Proficient in answering customer queries over calls, mails and doing various tasks like photocopying, fax or filing documentation
* Ability to handle and answer queries and inquiries related to policies
* Capable of managing and organizing insurance policy documents
* Competent in handling Microsoft Office Suite and other computer applications
* Exceptional interpersonal and customer service skills

**Work Experience:**

Insurance Assistant  
Starr Insurance Services, Stamford, CT   
July 2016 – Present

* Handling incoming calls, and assisting customers for choosing an appropriate life insurance policy
* Preparing insurance forms, including identification cards, policy papers, premium schedules, and endorsements for better understanding of the customers
* Assisting for the issuance of policy before maturity date in special cases like hospitalization or emergency situations
* Building and managing portfolio of insurance customers by maintaining good relationships, and providing quality services
* Assisting executives with their daily tasks like recording minutes of client meetings as well as handling the portfolios
* Coordinating with insurance agents to promote life insurance policies using unique marketing techniques, and added $50.5M in revenue for the last financial year
* Forwarding incoming messages and correspondence to agents working on field to achieve monthly targets

Insurance Assistant  
Secura Incorporation, Stamford, CT   
March 2015 – June 2016

* Identified business opportunities and contacted potential customers to explain life insurance policies
* Took responsibility to create underwriting reports for 150+ clients, and communicated the missing information to the team
* Researched and analyzed customers' demands, and suggested launching of 3 new MediClaim policies to senior management
* Rescheduled missed appointments for clients, and collected payments for medical as well as private insurances
* Provided timely professional advice to insurance policy holders by resolving queries, and processed monthly premium transactions
* Regularly communicated with team, insurance agents or brokers to research, and collect necessary information for reviewing transactions

Underwriting Assistant  
Secura Incorporation, Stamford, CT   
September 2013 – February 2015

* Performed underwriting support activities associated with information gathering, and prepared list of prospective clients
* Completed and prepared documents on certificates, proposals and policy summaries under supervision
* Worked with other underwriters to assist in daily processing of multiple insurance products available according to age group
* Provided assistance in manual policy issuance by completing paperwork formalities for new clients, and informed them about policy benefits
* Answered queries to resolve minimum doubts, and converted potential clients into long-term policyholders by explaining available life insurance policies
* Performed various pre-underwriting activities by gathering data, analyzing it, and selecting rates or forms for coverage

Cashier  
Crowne Plaza Hotel, Stamford, CT   
July 2012 – August 2013

* Maintained files and records relating to financial transactions at the receptionist desk
* Greeted customers, understood their lodging requirements, and provided them best rooms as per their needs
* Prepared final invoices by including other fees like valet parking, room service, WiFi charges, and other special services offered at the hotel
* Handled cash drawers during peak hours, and tendered change to customers
* Performed bookkeeping duties by maintaining daily transaction records
* Processed credit and debit card payment as per the client's convenience
* Recorded food orders and processed payments displaying excellent customer service

**Education:**

* Bachelor's Degree in Finance  
  University of Connecticut, Stamford, CT   
  2012

**Reference:**

On request.