
Insurance And Financial Advisor Resume

Job Objective

To enhance my skills as an Insurance And Financial Advisor by joining forces with a growing establishment seeking qualified applicants.

Summary of Qualifications:

- Strong experience in insurance and financial planning
 - Wide knowledge of finance and insurance, retirement accounts, tax services and financing accounts bank sales with proven sales records
 - Ability to build and expand relationships and meet potential new clients
 - Ability to incorporate with bank partners
 - Sound knowledge of trust, banking and credit products
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Work Experience:

Insurance And Financial Advisor, August 2005 – Present
NL Financial Services, Richmond, VA

- Met and contacted new potential clients to discuss financial concerns and needs.
 - Conducted meetings with clients to collect relevant data.
 - Analyzed client needs and presented potential solutions.
 - Provided on-going service to clients.
 - Developed and implemented personal business and marketing plans.
 - Explained about the extensive Portfolio of Insurance Products, Variable Life Products and Mutual Funds to the customers.
 - Issued bonuses and Awards for Achieving Set Production Goals.
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Education:

Bachelor's Degree in Finance, Tarleton State University, Stephenville, TX

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