
INSURANCE ESTATE PLANNER RESUME

Summary:

A highly accomplished, dedicated and disciplined Insurance Estate Planner accustomed to dealing with a wide variety of professionals; render exemplary customer service; distinguishes as self-directed team player and performer, consistently completing assignments proficiently and productively; result-oriented individual with an exemplary track record of success in arbitration, negotiation, review, field appraisal and claims management, personal development, quality control and scheduling

Professional Experience:

Insurance Estate Planner January 2007 – present
Combined Insurance, Atlanta, GA

Responsibilities:

- Assessed assets and liabilities of estate.
- Determined the qualification of the insurance if it is adequate for financial protection.
- Estimated value of estate by analyzing and studying legal instruments like trusts and insurance policies.
- Determined the value of adjusted gross estate, by calculating expenses, taxes, and debts.
- Coordinated and communicated with clients to discuss and prepare insurance programs.
- Communicated with clients to provide maximum financial security for family and to protect investments.

Insurance Appraiser May 2004– January 2007
National Agents Alliance, San Diego, CA

Responsibilities:

- Examined damaged vehicles to determine extent of repair for the damaged parts.
- Determined salvage value on total-loss vehicles.

Insurance Agent February 1999 – May 2004
Federal Deposit Insurance Corporation, Dallas, TX

Responsibilities:

- Assessed assets and liabilities of estate.
- Determined the qualification of the insurance if it is adequate for financial protection.
- Estimated value of estate by analyzing and studying legal instruments like trusts and insurance policies.
- Determined the value of adjusted gross estate, by calculating expenses, taxes, and debts.
- Coordinated and communicated with clients to discuss and prepare insurance programs.
- Communicated with clients to provide maximum financial security for family and to protect investments.

Insurance Appraiser May 2004– January 2007
National Agents Alliance, San Diego, CA

Education:

Associate Degree in Finance, Stanford University, 1999
Bachelor of Science in Business Management, Stanford University, 1994

Skills:

- Driven and determined
 - Good communication skills, both written and verbal
 - A creative approach to new campaigns
 - Good negotiating and interpersonal skills
 - Strong organizational skills
 - Commercial awareness, for pricing and analyzing data
 - Good numeracy skills and a knowledge of statistics
 - A high standard of computer literacy
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Awards and Honors:

Insurance Information Institute, Member
International Claim Association, Member

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