

CAREER SUMMARY

Excellent track record and outstanding performance in all aspects of the insurance industry. Consistently successful in increasing premium revenues and individual life volume at a minimum of 25% year-over-year. Experience in professional agent recruitment, training and motivation. Strong presentation, negotiation and closing skills. Demonstrated ability to supervise and communicate with people from various levels of an organization

Selected Achievements:

- Certificate of Distinction for 2002 from the Life Underwriters Association of Canada
- Sales incentive award from NN Financial as top broker in Eastern Ontario in 2000 when sales increased by 200%
- Attained membership in Mutual Leaders' Club within the first year of hire and continued until July 1997
- Consistently qualified for all company sales campaigns (two per year) from 1995-2001
- Received numerous sales awards including Recruit Pin and Plaque in 1999 and 2000
- Ranked 5th as Recruit of the Year in Ontario in 1998

EMPLOYMENT

Insurance Broker (*Associate General Agent*) 1999–Present
Contracted with NN Financial, Norwich Union, Colonia Life and Financial Life

- Meet with clients to evaluate financial needs and recommend appropriate products
- Extensive customer contact through in-person sales presentation and telephone service are critical success factors in this role
- Provide sound financial planning advice; match people to products and offer Individual Life, Disability Income, Group Benefits, RRSPs, RRIFs, and Annuities to these individuals

The Mutual Group, Whitby, Ontario 1994–1998
Agent/Recruiting Specialist (1997-1998)
Agent (1994-1997)

- Recruited to provide total financial planning to clients, from needs analysis, retirement planning, estate conservation to group benefits and mortgage referrals
- Maintained an average of 90 new life applications per year from 1995 to 1997
- Achieved 104 new life applications in 1994

EDUCATION

- Registered Insurance Brokers of Ontario (RIBO) Licence (in progress)
- Successfully completed the Life Underwriters Association of Canada's Training Courses I & II
- Certificate in Counsellor Selling
- Bachelor of Commerce, University of Waterloo, 1992