

# Insurance Agent

(555) 010-0000 · you@example.com · City, ST · linkedin.com/in/your-name

## Summary

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Licensed insurance agent with six years writing personal and commercial lines, growing a book through cross-sell and referrals while sustaining high client retention and consistently exceeding monthly new-premium targets.

## Experience

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### Insurance Agent, Evergreen Insurance Partners

2021 – Present

*City, ST*

- Wrote \$1.3M in new annual premium across auto, home, and umbrella lines, finishing at 121% of goal.
- Bound an average of 34 new policies per month while maintaining a quote-to-bind ratio of 38%.
- Raised household cross-sell ratio from 1.7 to 2.4 policies by reviewing every new client for bundling gaps.
- Sustained 91% book retention at renewal through proactive annual coverage reviews on top accounts.
- Generated 45% of new business from referrals by asking for introductions after every bound policy.
- Processed quotes and endorsements in the agency-management system with zero compliance findings on audit.
- Recovered 22 lapsed policies in one year through a structured win-back call and email cadence.

### Insurance Sales Producer, Summit Coverage Agency

2018 – 2021

*City, ST*

- Produced \$780K in new premium in the final year, ranking third of 14 producers in the agency.
- Quoted 60-plus prospects monthly across multiple carriers to match coverage to client risk and budget.
- Closed 28% of inbound life-insurance leads by qualifying needs with a structured fact-find.
- Built a small-commercial pipeline that added 30 business policies over three years.
- Followed every carrier's underwriting guidelines, keeping the application-decline rate under 6%.
- Earned a top-producer trip twice for exceeding annual new-premium targets.

## Education

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### Bachelor of Science in Finance

2014 – 2018

*State University — City, ST*

## Certifications & Licenses

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State Property and Casualty Insurance License · State Life and Health Insurance License

## Skills

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New premium production · Quote-to-bind conversion · Cross-selling lines · Book retention · Property and Casualty lines · Life and Health lines · Referral generation · Agency-management systems · Underwriting guidelines · Needs-based selling · Multi-carrier quoting · Policy win-back