

Doug Matte

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INSURANCE AGENT

Performance Summary: Forward-looking insurance agent with 9 years' track record of determining clients' insurance coverage needs and creating insurance plans to meet them specifically. Exceptionally well-versed at developing bases for long term sources of clients through dedicated referral systems. Competent at interviewing clients to obtain preliminary data about their financial resources. A meticulous individual who effectively customizes standard insurance programs to meet the individual needs of each client. Proficient in contacting underwriters and handle forms to obtain binder coverage for existing plans.

CORE COMPETENCIES

- Prospecting
- Sales Generation
- Claims Monitoring
- Customization
- Needs Assessment
- Risk Management
- Marketing Strategies
- Annuities Plans
- Mutual Funds
- Property Inspection
- Statistical Analysis
- Lead Generation

PROFESSIONAL EXPERIENCE

Insurance Agent (6/2013 to Present)

BB & T Insurance, Rosedale, MD

- Provide insurance coverage to a 55 year old client, whose eligibility had run out, by generating a custom plan for her
- Create a set of "needs assessment" checklist, resulting in increased efficiency in assessing clients' insurance requirements
- Prospect potential clients by calling them on the telephone or contacting them through emails
- Generate leads and follow up on them to gain business opportunities
- Interview clients to determine their insurance needs and provide them with insurance coverage options
- Determine what types of insurance plans will suit clients, in accordance to their

specific financial backgrounds

- Customize insurance programs to meet the specific requirements of each client by ensuring proper coverage of risks

Insurance Agent(5/2009 to 6/2013)

Maple Insurance Company, Rosedale, MD

- Generated 1500 leads within 2 months, 855 out of which were converted into business-providing clients
- Trained 18 newly hired insurance agents in handling clients' prospecting and lead generation activities
- Explained features and advantages and disadvantages of different policies
- Performed background checks to verify clients' backgrounds
- Assisted clients in filling out insurance forms and following up on insurance claims
- Maintained records of insurance policies to ensure timely renewals

Insurance Intern (2/2007 to 5/2009)

The Insurance Solution, Rosedale, MD

- Made telephone calls to prospective clients to prospect business
- Responded to inbound calls by providing information of offered insurance policies
- Assisted clients in determining their insurance coverage needs by interviewing them and providing feedback
- Created and maintained files and records of insurance policies in a confidential manner
- Assisted in following up with clients to ensure timely policy payments

EDUCATION

St. James High School, Rosedale, MD – 2009

High School Diploma

TECHNOLOGICAL SKILLS

MS Word, Excel and Outlook

Typing Speed: 40 wpm without errors