

Jason Adams

Insurance Agent

Insurance agent with 6 years of experience growing referral pipelines and retaining policyholders across personal and commercial lines. Grew referral business by 41.2% year over year by launching a policyholder appreciation program that generated 87 qualified referrals in 12 months, and reduced policy cancellation rate by 22.21% across a commercial-lines book by renegotiating coverage terms and adjusting deductibles for 46 accounts flagged during quarterly portfolio audits.

CONTACT INFORMATION

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Ashland, OR 12345

EDUCATION

BS Business Administration
Southern Oregon University, Ashland, OR
2016 – 2020

KEY SKILLS

- CRM software
- Vertafore AMS360
- Microsoft Excel
- Premium calculation
- Policy analysis
- Regulatory compliance
- Needs assessment
- Prospecting and lead tracking
- Personal and commercial lines

PROFESSIONAL EXPERIENCE

- Insurance Agent, Rogue Valley Coverage Associates LLC, Ashland, OR
  2023 – Present
  - Grew referral business by 41.2% year over year by launching a policyholder appreciation program that generated 87 qualified referrals in 12 months.
  - Built and maintained a prospect pipeline of 314 active leads in CRM software, scheduling follow-up calls within 48 hours of each initial inquiry.
  - Reduced policy cancellation rate by 22.21% across a commercial-lines book by renegotiating coverage terms and adjusting deductibles for 46 accounts flagged during quarterly portfolio audits.
  - Interviewed prospective clients to assess financial resources and property conditions, preparing customized quotes for home, auto, and umbrella policies.
- Insurance Sales Associate, Siskiyou Ridge Insurance Group, Medford, OR
  2021 – 2023
  - Expanded referral business by 33.8% over 18 months by requesting introductions at each annual policy review and tracking referral sources in Vertafore AMS360.
  - Maintained a prospect pipeline averaging 227 contacts by attending 4 local chamber events per quarter and logging each new lead the same day.
  - Cut policy cancellations by 16.32% on a personal-lines book by restructuring premium payment schedules from annual to quarterly billing for 39 accounts that cited affordability concerns.
  - Calculated premiums and established monthly or quarterly payment plans for 41 new policies per month, verifying coverage limits against underwriting guidelines.
- Insurance Customer Service Representative, Bear Creek Financial Services Inc., Central Point, OR
  2020 – 2021
  - Generated 23 referral leads per quarter by identifying upsell opportunities during inbound service calls and connecting callers with licensed agents.
  - Explained features, advantages, and disadvantages of auto, renters, and life policies to walk-in prospects, contributing to $88,740 in first-year written premium.
  - Processed policy endorsements and billing adjustments for 162 accounts per month, confirming accuracy of each change before submission.