NP

Nicholas Perez

Senior Insurance Agent

CONTACT INFORMATION

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Meadville, PA 12345

EDUCATION

- **BSBA in Marketing**
  Edinboro University of Pennsylvania, Edinboro, PA | 2010 - 2014

KEY SKILLS

- Cross-selling strategy
- CRM software
- Vertafore AMS360
- Microsoft Excel
- Policy underwriting coordination
- Life and health product knowledge
- Commercial lines quoting
- Regulatory compliance
- Sales team coaching
- Needs analysis

ABOUT ME

Chartered Life Underwriter with 12 years of experience coaching agents, coordinating underwriting, and growing multi-line books across personal and commercial accounts. Lifted team productivity by 34.6% by coaching 9 agents on consultative selling methods and weekly pipeline reviews. Generated $378,200 in annual written premium by cross-selling umbrella, life, and liability add-ons to existing property policyholders across 189 accounts.

PROFESSIONAL EXPERIENCE

SENIOR INSURANCE AGENT | CONNEAUT CREEK INSURANCE ASSOCIATES LLC, MEADVILLE, PA

2020 - PRESENT

- Coached 9 agents on consultative selling methods and weekly pipeline reviews, lifting team productivity by 34.6% within 14 months.
- Generated $378,200 in annual written premium by cross-selling umbrella, life, and liability add-ons to existing property policyholders across 189 accounts.
- Launched a cross-selling initiative pairing auto policyholders with renters and life products, raising the cross-sell rate from 13.79% to 31.4% over 2 years.
- Attended 6 carrier seminars per year to evaluate new product offerings and trained the team on updated underwriting guidelines within 5 business days of each session.
- Contacted underwriters and submitted binder forms for 74 commercial accounts per quarter, securing coverage within an average of 2.4 days per application.

INSURANCE AGENT | FRENCH CREEK COVERAGE GROUP INC., ERIE, PA

2016 - 2020

- Raised team productivity by 23.17% after designing a shared daily call-block schedule and tracking outbound activity for 6 agents in CRM software.
- Increased cross-selling success by 27.4% across a personal-lines book by bundling home and auto policies during annual coverage reviews.
- Maintained records for 213 active policyholders in Vertafore AMS360, updating contact details, coverage changes, and renewal dates within 24 hours of each interaction.
- Submitted completed underwriting forms and medical exam results to carriers for 53 life insurance applications per quarter, averaging 3 days from receipt to submission.

JUNIOR INSURANCE AGENT | ALLEGHENY FOOTHILLS FINANCIAL SERVICES LLC, TITUSVILLE, PA

2014 - 2016

- Prepared auto and homeowner quotes for 112 walk-in and phone inquiries over the first 10 months, writing $87,430 in first-year premium from the ones that bound.

- Improved cross-sell rate by 24.9% by identifying coverage gaps in existing auto policies and recommending complementary renters and life products.
- Processed policy renewals and endorsement changes for 118 accounts per month, verifying premium calculations against carrier rate tables before submission.

CERTIFICATIONS

- **CHARTERED LIFE UNDERWRITER | THE AMERICAN COLLEGE OF FINANCIAL SERVICES | 2019**