

Chronological/Accomplishment format

GROUP INSURANCE EXECUTIVE with extensive background in marketing employee benefits, sales management and the servicing of accounts.

Skilled in directing and managing group sales office in the medium and large case markets and the designing and administering of benefit plans and healthcare cost controls. Adept at developing new sources of business and consultant relationships.

Recognized as motivated, goal oriented and well organized self starter with excellent presentation and communication skills.

MAXA, New York City 2000 – present

Divisional Group Manager

Directed staff of nine to achieve sales and net growth objectives and manage 70 cases developing \$60 million of premium. Recruited, trained and motivated group sales and service representatives. Developed new sources of business and strengthened consultant relationships.

- In two years, rebuilt division to achieve national honors by exceeding quota objectives and attaining rank of third largest group office in company.
- Achieved national honors in 1992, 1993, and 1996 by exceeding quota objectives and overall office performance. Directed group representatives so that 33% in 1992 and 50% in 1993 and 1996 qualified for national honors by exceeding goals.
- Generated three out of four group representative promotions in region from division in seven years.
- Achieved 168% of divisions' life premium quota, ranking third highest in the company in 1996.

Group Account Executive

Managed and serviced six group accounts developing \$35 million of premium. Successfully renewed and managed financial results of each account. Coordinated all resources of Quikcorp in providing consultant services on benefit design, healthcare cost management, industry trends and legislative developments. Generated new business and enhanced relationships with clients and consultants.

- Conserved dissatisfied client by resolving serious claim, administrative and communication problems. Analyzed claim reports and recommended benefit changes and healthcare cost initiatives. Generated interest and commitment to offer a universal life program for employees.
- Preserved troubled 40-year old account by resolving difficult renewal and securing officer signatures to important documents. Mediated agreement between a hostile parent company and subsidiary to change reporting procedures, restoring an effective working relationship.

U.S.A. LIFE INSURANCE COMPANY, New York City 1995 – 2000

Vice President

Directed and managed group expansion marketing plans for Western Region. Assisted senior management in pricing and product development. Developed and implemented programs for marketing and underwriting flexible benefit plans to small groups. Total responsibility for opening seven new group offices; recruited seven new group managers.

- Achieved marketing objectives by increasing sales 184% and profit growth rate by 20% in four years.

UNITED, New York City 1989 – 1995

Group Sales Manager

Directed and managed a staff of 21 in achieving sales and net growth objectives. Developed new sources of business and enhanced relationships at major consulting firms. Recruited five group representatives and six service representatives, doubling the office size in three years.

- Awarded President's Cup three out of five years for being the top group office in the company for achieving objectives and efficiency in overall management and performance.

JOHN ADAMS, New York City and New Jersey 1970 – 1979

Group Sales Manager

Started in New York City Group offices as a group sales trainee. Achieved recognition as a sales production leader in 1972 and 1973. Progressed to assistant manager position in 1974 and was promoted to manager of the Maplewood, New Jersey office in 1977.

EDUCATION/TRAINING

Pitzer College, Claremont, CA, B.B.A./Marketing
New York University Stern Graduate School of Business, Management and Marketing
Dale Carnegie Institute
N.A.S.D.
Grid Management Course (UNITED)
Forum Corporate Sales Course

PERSONAL

New Canaan Exchange Club – Board of Directors
Pitzer College Alumni representative in Connecticut
New Canaan Field Club – Director
United Way Director