**Kalen Newman**

18th Street, Chester, PA Kalennewman@email.com 123-456-7899

**PROFESSIONAL PROFILE**

* Insurance Industry leader with over 15 years of experience increasing organizational effectiveness.
* Areas of expertise include: customer service, account management and brokerage.
* Strong commitment to customer satisfaction, including detail, team orientation and communication.

**EDUCATION**

Widener University Chester, PA

Master’s Degree, Organizational Development and Leadership 5/2021

G.P.A.: 3.45

Widener University Chester, PA

Bachelor of Arts, Psychology 5/2005

**Selected Coursework**: Effective Communication, Interpersonal Communication, Introduction to Public Relations, Organizational Communication, Introduction to Applied Supervision, Effective Planning and Organization, Developing Effective Decision-Making and Problem-Solving Competencies

**EXPERIENCE**

**Associate Broker**, AmWins Brokerage of PA, Ft. Washington, PA

October 2015-Present

* Maintain current and acquire new business relationships with retail producers.
* Collaborate with underwriters from admitted and surplus lines carriers to book and retain profitable business.
* Perform all functions for renewal and new booking of business resulting in $500k in revenue.
* Implement marketing strategies for new business and renewals.

**Account Manager**, Oxford Millin Insurance Agency LTD, Jenkintown, PA

July 2012-October 2015

* Maintained small commercial accounts ranging in size from $500 to $10,000.
* Performed all functions necessary for quoting, renewals, remarketing and endorsements for new business and current clients.
* Collaborated with underwriters from admitted and surplus lines carriers to book and retain profitable business.
* Securely handled all incoming checks/credit card payments from insured clients and insurance carriers.
* Created spreadsheets for renewals vs. nonrenewal, profits vs. losses, and tracking all monies received daily.
* Processed all Certificate of Insurance requests from clients.

**Insurance Consultant**, AON-Affinity Insurance Services, Hatboro, PA

September 2008-April 2012

* Provided excellent customer service to Elite Association Members with special attention to detail regarding their accounts.
* Processed all account maintenance necessary to ensure that members policies were current and accurate.
* Helped with resolving all troubleshooting issues related to member policies and carrier inquiries.
* Processed payment by phone and researched all billing/payment issues.
* Generated Schedule Pages and Certificates of Insurance for insured members.
* Handled the administration of claims for clients regarding their Long-Term Disability, term Life, Accident Disability, Accidental Death & Dismemberment, Dental, Cancer and hospital Indemnity Plans.

**Insurance Specialist**, AAA Mid-Atlantic Hamilton, NJ

November 2006-June 2007

* Handled inquiries regarding the Accidental Death and Dismemberment and Supplemental Insurance Policies for travel accidents.
* Processed credit card payments for policy holders.
* Handled inquiries from insured members regarding their car and homeowner’s policies.
* Updated any changes made on behalf of our insured member’s car and /or homeowner’s policies.

**SKILLS**

Microsoft Office (Word, Excel, PowerPoint), Google Docs

**LICENSES**

Pennsylvania Resident Producer Individual License; Lines of Authority: Accident and Health, Life and Fixed Annuities, Casualty and Allied Lines, Property and Allied Lines. Pennsylvania Resident Surplus Lines; Lines of Authority: Property and Casualty