

# Anonymous

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## EDUCATION

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### University of California, Non-Target

*Bachelor of Arts in Economics*

California

June 2011

- Relevant Coursework: Financial Accounting Analysis and Planning, Macroeconomics, Microeconomics, Calculus, Econometrics

## EXPERIENCE

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### No-name Insurance Company – Reinsurance Division

*Reinsurance Analyst*

California

December 2012 – Present

- Work closely with a team of high-level executives, including the CEO and COO, to help grow a \$30 million dollar book of specialty reinsurance business; Often working long hours in a very project oriented and time-constraining atmosphere
- Manage business relationships with brokers and C-Level executives of large national insurance carriers from proposal to program launch; Topics of discussion include: pricing, distribution strategy, accounting processes, and program structures
- Assess risk of potential clients by analyzing insured spreads, risk classes, premium totals, claims information, and historical data
- Determine the financial stability and solvency of prospective companies by analyzing their balance sheet, income statement, and statement of cash flows
- Lead the implementation of new accounts by coordinating with internal staff to create proposals, generate reports, follow up with clients, update data management spreadsheets, set up meetings, and produce treaty contracts
- Present products and services in front of high-level executives, staff, and external agents to increase marketing and sales efforts, as well as educate the market on coverage needs and risk management services
- Gather and send marketing materials to prospective clients, and work with our marketing department to develop customized campaigns for new and existing clients
- Train new employees to maintain current processes and procedures; Took initiative by developing a new filing system to streamline department expansion

### Bulge-Bracket Bank

*Customer Service & Sales Representative*

California

January 2007 – December 2012

- Developed strong relationships in the community, specifically with hundreds of repeat customers, and effectively marketed customized product solutions to improve banking relationships
- Assessed client profiles to determine loan eligibility and other credit opportunities by identifying average balances, years as a customer, occupation history, outstanding loans or lines, and current assets held with the bank
- Led the branch in business loan referrals for 8 consecutive quarters, and assisted clients with loan payments, servicing, and other inquiries
- Accurately processed over 100,000 banking transactions that involved great attention to detail with no major errors, and was specifically in charge of handling multifaceted merchant business
- Completed over 300 regulatory compliance exams to keep up to date on financial laws and procedures and took an active role in four branch audits that required a detailed inspection of operational records, paper transactions, and compliance materials
- Achieved “Customer Service” Story of the Month Award for outstanding performance and customer service, and received a published article in the “Bulge Bracket’s” Monthly Newsletter discussing the accomplishment
- Trained new employees to process transactions efficiently, developed their banking platform software skills, and educated them on current financial products and services

## FINANCIAL TRAINING

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- Completed the “Wall Street Training (WST)” self-study financial modeling training program
- Familiar with capital markets and basic financial modeling terminology, concepts, and valuation methodologies

## SKILLS & INTERESTS

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- Proficient in Microsoft Word, Excel, PowerPoint, Access, and Outlook
- Excellent attention to detail, writing, interpersonal, communication, relationship management, and project supervision skills
- Enjoy hiking, community service (300 hours), basketball, softball, and bowling (recreation leagues)