

Lupe Bassan

Insurance Consultant

✉ lupe.bassan@gmail.com

☎ (786) 817-4665

📍 123 Elm Street, Omaha, NE 68102

EDUCATION

Bachelor of Business Administration in Insurance and Risk Management at University of Nebraska-Lincoln, NE

Sep 2017 - May 2022

Relevant Coursework: Risk Management Principles, Insurance Law, Corporate Finance, Business Statistics, Actuarial Science, Financial Analysis, Property and Casualty Insurance, Life and Health Insurance, Employee Benefits, and Enterprise Risk Management.

LINKS

[linkedin.com/in/lupebassan](https://www.linkedin.com/in/lupebassan)

SKILLS

Risk Assessment

Policy Analysis

Claims Management

Underwriting Expertise

Actuarial Proficiency

Salesforce CRM

Microsoft Excel

LANGUAGES

English

Spanish

HOBBIES

PROFILE

Insurance Consultant with 1 year of experience in providing expert advice and tailored solutions to clients seeking insurance coverage. Proficient in analyzing client needs, assessing risks, and recommending optimal policies. Demonstrated success in building strong relationships with clients and industry partners. Adept at navigating complex insurance landscapes, with a commitment to staying up-to-date on industry trends and regulations. Seeking to leverage expertise in insurance consulting to drive client satisfaction and achieve company goals.

EMPLOYMENT HISTORY

Insurance Consultant at Farm Bureau Financial Services, NE

Mar 2023 - Present

- Successfully increased client portfolio by 35% within one year, helping Farm Bureau Financial Services, NE to expand its market share and strengthen customer relationships.
- Implemented new marketing strategies that resulted in a 20% increase in leads generation and a 15% conversion rate improvement, boosting overall sales for the company.
- Reduced claim processing time by 25% through streamlining workflows and introducing new technologies, resulting in improved customer satisfaction and reduced operational costs.
- Led a team that achieved a 95% customer retention rate, ensuring continued business growth and solidifying Farm Bureau Financial Services' reputation as a trusted insurance provider in Nebraska.

Associate Insurance Consultant at State Farm Mutual Insurance Company, NE

Aug 2022 - Feb 2023

- Successfully increased policy sales by 35% within the first year, resulting in a boost of \$500,000 in new annual premiums for the agency.
- Implemented an effective customer retention program, reducing policy cancellations by 20% and saving the agency approximately \$300,000 in potential lost revenue.
- Streamlined the claims processing system, cutting the average claim processing time by 25%, leading to higher customer satisfaction rates and a 15% increase in referrals.
- Developed and led a series of training workshops for new agents, improving overall team performance by 30% and contributing to the agency's recognition as one of the top-performing State Farm branches in NE.

CERTIFICATES

Chartered Insurance Professional (CIP)

Feb 2022

Certified Risk Manager (CRM)

Sep 2020