

# Jeff Rosenthal

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## Insurance Brokerage Executive Vice President

Tireless, results-driven insurance executive with consistent track record of retaining and acquiring clients. Hands-on management style, with demonstrated success improving sales performance of account managers through innovative training. Possesses superior negotiating and communications skill.

### Strengths

- \* Account executive oversight and training
- \* Client risk assessment, management and mitigation
- \* Contract negotiation/modification/review
- \* Expertise in servicing complex accounts
- \* Completely focused – no errors, no omissions
- \* Public speaking and professional presentations
- \* CIC licensure in over 40 states
- \* Extensive knowledge of state insurance regulations
- \* Customer relationship enhancement and sales
- \* Marketing strategies and publicity campaigns
- \* Tail coverage negotiations
- \* Meticulous research and fact-finding
- \* Human Resources administration
- \* Excellent interpersonal/communication skills

*Devoted to the highest level of customer service, regardless of client account size.*

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### Professional History

#### **2005 – Present, Executive Vice President, Visa International Insurance Brokers Southgate, CA**

- Oversees staff of 13 account executives for a brokerage doing \$12 million worth of insurance business for commercial and personal clients
  - \* Personally responsible for having written \$8 million (66%) of above total
- Oversees all aspects of brokerage, including HR; personnel; sales and sales training; company books; contract negotiation/renegotiation, equipment procurement and leases; and personnel oversight
- Advises President on personnel matters and other key issues
- Negotiates contracts and tail coverage between senior insurance executives and commercial clients
- Ensures all contracts comply with applicable state insurance regulations
- Trains account executives in innovative sales techniques and sales best practices
- Stays abreast of industry developments by taking 25 - 50 hours of continuing education annually
- Networks regularly with area business people to acquire new commercial clients
- Provides service 24/7 year round to ensure all client needs are quickly met
- Specializes in acquiring and servicing commercial accounts of businessmen of South Asian descent
  - \* Manages 19 different Jack-in-the-Box accounts that cover over 600 restaurants in the U.S. that are operated by owners from South Asia, particularly India and Pakistan
  - \* Grew above clientele from one account to 19 over 10-year period through careful networking
  - \* Accounts bring in \$1 million annually
- Provides sole brokerage service for Primary Eyecare Network, the California Land Service Association and Society of Independent Accounts
  - \* These accounts bring in \$1 million annually
- Reviews all commercial policy contracts to ensure clients receive eligible discounts
  - \* Retained major commercial client that planned to patronize competitor through such a review, saving \$30,000 in annual revenues

**2003 - 2004, Assistant Vice President, Visa International Insurance Brokers** Southgate , CA

- Provided executive assistance, encompassing all areas of operations
- Oversaw work of all account executives
- Promoted to Executive Vice President in recognition of excellent performance

**1988 - 2003, Senior Account Executive, Visa International Insurance Brokers** Southgate, CA

- Issued certificates of insurance; helped clients fill out complex forms; helped clients assess and manage risks; negotiated tail coverage; filed claims; mailed policies; and coordinated policy changes
- Grew company revenues from \$2 million to \$9.5 million over four-year period (2003-2007)
- Acquired and managed accounts from array of insurance sectors, including commercial property; general liability; D&O; EPLI; E&O; workman's compensation; home; auto; personal; and life and health
- Traveled extensively throughout the U.S. to negotiate deals with insurance executives
- Took query telephone calls and worked to convert callers into new clients
- Networked extensively to increase client base, including attending meetings of local Chamber of Commerce groups, LeTip, and other commercial organizations
- Made regular cold calls to solicit new business accounts
- Mentored junior brokers and provided peer reviews
- Gave presentations to company executives to educate them on brokerage's products and services

### **Education and Training**

- Ongoing Continuing Education - 25 to 50 hours yearly at various locations in the U.S.
- Santa Rosa Junior College, Santa Rosa, CA - Coursework in insurance and business
- Insurance 21, 22 and 23 - Insurance Institute of America, Malvern, PA
- Terra Linda High School, San Rafael, CA - Graduate