# Tyler Brooks

Financial Representative

tyler.brooks@email.com (414) 555-0172 Milwaukee, WI linkedin.com/in/tylerbrooks

## SUMMARY

Financial representative in a first-year advisor program, licensed for life, accident and health insurance and registered for Series 6 and 63. Placed 48 insurance and annuity contracts in the first year by building a client base from community events and referrals. Brings 3 years of retail sales and customer service experience to every client meeting.

## EXPERIENCE

### Financial Representative

09/2025 - Present

Great Lakes Mutual Financial

Milwaukee, WI

*Insurance and financial planning firm with 140 representatives in Wisconsin.*

- Complete financial needs analysis meetings with **15** new prospects a month, about 40% of them from client referrals.
- Write 48 life insurance and disability insurance policies and annuities in the first year, ranking 4th of 22 new representatives.
- Design retirement planning recommendations for young families, opening 18 IRA and 529 accounts so far.
- Track 600 prospects and follow-ups in Salesforce, setting 12 to 15 appointments a week by phone.

### Retail Sales Lead

06/2022 - 08/2025

Lakefront Outdoor Supply

Wauwatosa, WI

*Outdoor gear retailer with 8 Midwest stores.*

- Led a sales floor of 10 associates on weekend shifts and beat monthly sales targets in 26 of 36 months.
- Signed up 30 customers a month for the store credit card, the highest rate among 8 stores in the district.
- Resolved customer service escalations, returns and special orders, raising store survey scores from 82 to 91.
- Trained 14 new hires on product knowledge, register procedures, store opening steps and loss prevention.

## SKILLS

- Life Insurance
- Disability Insurance
- Annuities
- Retirement Planning
- Financial Needs Analysis
- Salesforce
- Sales
- Customer Service
- Self-Starter

## EDUCATION

### Bachelor of Business Administration

05/2022

University of Wisconsin-Milwaukee

Milwaukee, WI

Business Administration

## CERTIFICATES

### Life, Accident and Health Insurance License

10/2025

Wisconsin Office of the Commissioner of Insurance

### Securities Industry Essentials (SIE)

08/2025

FINRA

### Series 6 and Series 63 Licenses

02/2026

FINRA