Omar Haddad

FINANCIAL SERVICES REPRESENTATIVE

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SUMMARY

Financial Services Representative with 5 years in banking and insurance, now running life, annuity and retirement planning reviews for a multi-line agency's 2,400 households. Explains financial products in plain terms, brings in $2.1M in annuity deposits a year, and keeps every file in regulatory compliance. Licensed in Michigan with FINRA Series 6 and 63.

SKILLS

Financial Products • Life Insurance • Annuities • Retirement Planning • Auto Insurance • Home Insurance Needs Analysis • Regulatory Compliance • Microsoft Office • Customer Service Skills

EXPERIENCE

Financial Services Representative 07/2023 - Present

Great Lakes Family Insurance & Financial Dearborn, MI

Multi-line agency offering insurance, annuities and retirement products.

- Conduct 12-15 needs analysis reviews a week for **2,400** agency households, writing about 9 life insurance policies a month.
- Grow annuity and IRA rollover deposits to $2.1M a year for clients 50 and older.
- Review auto and home insurance at each financial meeting, adding about 18 bundled households a quarter.
- Maintain suitability records and disclosures for every sale, passing 3 regulatory compliance audits with no findings.

Personal Banker 06/2021 - 06/2023

Wayne County Community Credit Union Detroit, MI

Credit union branch serving 9,000 members.

- Opened 25 checking, savings and CD accounts a month and referred 10 members a month to the financial advisor.
- Built Microsoft Office spreadsheets comparing loan and savings options for about 300 members a year.
- Resolved account and fraud claims for walk-in members with a 97% service score.

EDUCATION

Bachelor of Science 05/2021

Wayne State University Detroit, MI

Finance

CERTIFICATES

Life, Accident and Health Producer License

Michigan Department of Insurance and Financial Services

08/2023

Property and Casualty Producer License

Michigan Department of Insurance and Financial Services

10/2023

FINRA Series 6 and Series 63

FINRA

02/2024