

Lynette Johnson

Tax Professional

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History of implementing successful marketing strategies and initiatives designed to increase sales. A lengthy, professional background in the Insurance industry.

Personal Brand management, and sales experience, with 10+ years in progressive roles with a variety of employers.

Refined relationship-building skills and experience working collaboratively with the community.

PROFESSIONAL EXPERIENCE

Tax Professional

H&R Block, New York, NY, 2018–2019

After a 10 week course, supported the operations of a small tax office and increased brand awareness to the surrounding business owners

- Marketing with partnerships companies
- Attention to detail in every aspect of the customer experience
- Maintaining of client flow, updating appointment, and reception

Sales Representative

Combined Insurance, New York, NY, 2017–2019

Joined as Agent, worked on many team projects within the community helping individuals and small businesses prepare for the unexpected with final expense plans and disability plans.

- Increased brand awareness in the local community.
- Educated the consumer on the importance of supplemental insurance benefits in addition to major medical coverage.

Financial Professional

World Financial Group, New York, NY 2016–2017

Educated customers on insurance products and provided customized solutions to win prospects. Initiated sales by focusing on customer service and teamwork.

- Informed clients about tax free retirement options.
- Lowering tax liability of clients with tax advantage concepts.
- Reduced market volatility for clients with IUL products.

SKILLS

Workers Compensation and underwriting concepts

Reading and interpreting insurance documents

Reception

Tax Preparation

Administrative support

Customer service

Invoicing and endorsements

Prospecting

Life and disability insurance

Account Management

Employee Training and Development

HIGHLIGHTS

State Filing responsibility for **\$35 million in coverage**

AHIP certified

Achieved a **LEAN** yellow belt certificate

7-year proven policy **issuance** track record

Volunteered for various charities

EDUCATION

Bachelor of Business Administration

Baruch College, New York, NY

NYS Insurance License

NYS Department of Financial Services

H&R Block

Tax Associate Certification