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### **Licenses and Certifications**

- ❖ Licensed Property and Casualty Insurance Agent
- ❖ Licensed Life and Health Agent
- ❖ Certified Insurance Service Representative, **CISR**
- ❖ Commissioned Notary Public

### **Summary of Qualifications**

- ❖ Office Management
- ❖ Outlook/Lotus Notes/Email
- ❖ Strong Microsoft Office – Word, Excel, Power Point
- ❖ Docubase
- ❖ Quickfile
- ❖ Paperport
- ❖ Applied, The Agency Manager, **TAM**
- ❖ Journyx - Online Timekeeping System
- ❖ Sonic - Candidate, Account, and Open Requirement Database
- ❖ Talent Hook – Recruitment Tool/Candidate Searching
- ❖ Multi-Phone Line
- ❖ Data Entry
- ❖ System and Database Administration and Configuration
- ❖ Project Management
- ❖ Takes direction well and demonstrates a helpful, flexible manner.
- ❖ Learns quickly and is able to take on new and unfamiliar tasks.
- ❖ From start to finish, able to complete tasks in a timely manner.
- ❖ Well organized and pays attention to detail.
- ❖ Highly responsive to corporate requests.
- ❖ Excellent phone and customer service skills that aid in positive relationships with contractors, employees, clients, and carriers.
- ❖ Positive, outgoing presence in the office environment.

### **Employment Experience**

**3/2016-11/2016**

**Jeff Langlois State Farm**

**Office Account Representative**

- Sell and Service Insurance Policies
- Provide Insurance Financial Reviews for all clients in my book of business and contact clients in regards to gaps in coverage, premium changes, and/or ways to save. (by Alpha Split).
- Explain Policy Coverage and Information to clients
- Round Accounts

- Up Sell Coverage on Current Policies
- Process Changes, Endorsements, Cancellations, Reinstatements
- Explain Claims Process and Post Claim follow up with clients
- Respond to underwriting memos, client and company emails
- Contact Clients in regards to past due payments
- Process payments
- Release End of Day Remittance and Prepare Bank Deposits

**9/2011-11/2015**

**Carter Glass Insurance Agency**

**Personal Lines Account Representative**

- Sell and Service Personal Lines Insurance Policies
- Review Accounts for every Renewal in my assigned book of business and contact clients in regards to gaps in coverage, premium changes, and/or ways to save. (by Alpha Split).
- Explain Policy Coverage and Information to clients
- Round Accounts
- Up Sell Coverage on Current Policies
- Process Changes, Endorsements, Cancellations, Reinstatements
- Explain Claims Process and Post Claim follow up with clients
- Respond to underwriting memos, client and company emails
- Contact Clients in regards to past due payments
- Process payments
- Release End of Day Remittance and Prepare Bank Deposits

**9/2008-8/2011**

**Moore and Johnson Agency**

**Personal Lines Quality Control Manager**

- **6/2010-8/2010 (and when asked)**  
**Commercial Lines Processing (After Hours)**
- **3/2011-8/2011**  
**Commercial Lines Quality Control Manager**

**The following duties apply to both positions at Moore and Johnson.**

- Pulled the communication log and assign items downloaded into suspense to the proper insured daily.
- Reviewed and processed New Business Policies, Renewals, Endorsements, Non-Pay Notices, Reinstatement Notices, Cancellations, and all other incoming documentation from carriers.
- Quoted, uploaded, and issued policy endorsements via the carrier website.
- Followed up on all carriers' open activities.
- Checked all company-produced documents for accuracy.
- Referred gaps in coverage the Account Managers.
- Referred accounts that had rounding potential to the Account Managers.

- Reviewed applications and renewal questionnaires for missing information or adverse underwriting situations.
- Ran, reviewed, and worked Exceptions, Exclusions, and Expirations Reports.
- Managed Agency Bill Policies
- Maintained client files within the agency management system, updating information and recoding when necessary.
- Acted as second backup to the switchboard.
- Ran other reports and took on other duties and projects assigned by management.
- Trained new personal lines quality control managers.

### **9/2004-7/2008**

#### **Autonomic Resources, Cary, NC**

##### **Special Projects Manager**

- Performed duties as assistant to the Managing Partner/President.
- Performed duties as the office manager/coordinator.
- Contract administration.
- Client purchase order processing and administration.
- Draft documentation, contracts, and correspondence.
- Formatted candidate resumes.
- Served as the employee/contractor, client, vendor, and corporate point of contact for problems, questions, and invoicing.
- Reviewed and processed corp-to-corp invoices and client invoices.
- Performed a monthly billing reconcile with the corporate office for accuracy.
- Completed monthly sales reports for resale products.
- Reviewed and coded company credit card statements.
- Performed maintenance on job boards.
- Processed employee and contractor paperwork.
- System Administration and Configuration of the Journyx Online Time Keeping System, SONIC - Candidate, Account, and Open Requirement Database, Talent Hook Recruitment Tool.
- Point of contact for ITES-2S task order requests for bid.
- Provided project and budget management as well as recruiting for Federal Government contracts.

### **5/2004-9/2004**

#### **Commercial Park West, Durham, NC**

##### **Marketing Director**

- Managed two telemarketers
- Performed searches on the database Costar
- Entered the companies and call notes into the database Act!
- Assisted in making calls to new and active prospects.
- Designed ads for the Triangle Business Journal and other marketing material.
- Designed a monthly newsletter for current tenants
- Implemented a tenant referral program
- Interviewed and hired new telemarketers
- Performed market studies of competing properties

- Created monthly marketing plans
- Planned all events and parties (i.e. broker events, tenant appreciation)

**3/2001-2/2004**

**Glass Masters, Raleigh, NC**

**Customer Service Representative**

- Customer service and sales
- Filed comprehensive claims with various insurance companies
- Handled business to business accounts
- Scheduled appointments
- Filled orders with vendors
- Opened and closed the shop daily
- Made daily financial deposits
- Trained customer service representatives

○ **7/2002-5/2003 – Regional Assistant**

- Performed duties as assistant to the Regional Manager
- Performed inventory control for 25 Glass Masters locations
- Trained managers in company software, billing, and sales

### **Education**

**3/2000**

**Wayne Community College**

High School Education

**7/2007**

**Wake Technical Community College**

Some College Coursework completed

**References provided upon request.**