

Anjali Mishra

Life Insurance Advisor

Bhopal, Madhya Pradesh · [Phone] · [Email] · [Website or LinkedIn]

PROFESSIONAL SUMMARY

IRDAI-licensed life insurance advisor in the first year of practice, focused on term and child education plans for salaried families and small shopkeepers. Completed the insurer's agency training, builds needs-based proposals and follows up renewals personally. Seeks a larger agency or bancassurance channel where client service and persistency are rewarded.

SKILLS

Needs analysis · Term insurance · Child education plans · Premium follow-up · Proposal documentation · Client onboarding · Local networking · Mobile CRM apps

EXPERIENCE

Life Insurance Advisor — Private life insurer, agency channel, Bhopal

1 year · current

- Issued 52 policies with first-year premium of ₹11 lakh, mostly term plans for salaried families in their thirties.
- Maintained 13th-month persistency of 88 percent by calling every client a fortnight before each renewal date.
- Completed medical scheduling and document collection for all proposals, keeping the average issuance time under ten days.

Customer Service Associate — Multi-brand insurance call centre, Bhopal

8 months

- Answered about 60 policyholder calls daily on premium payments, nominee changes and claim status in Hindi and English.
- Escalated delayed claim cases with complete notes, helping the team lower repeat calls on the same issue.

EDUCATION

B.A. (Economics) — Government women's college, Bhopal

CERTIFICATIONS AND REGISTRATIONS

- IRDAI-licensed life insurance agent (IC-38 passed)

PROJECTS

- Neighbourhood awareness camp — organised a Sunday session on term cover for 40 shopkeepers, leading to nine proposals

LANGUAGES

Hindi · English