

# WILLIAM M. STEVENSON

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## Areas of Expertise

- Client-focused Team Building
- Sales & Strategic Planning
- Home Office & Field Relationships
- New Business Development
- Asset Retention Initiatives
- Cross-selling Techniques
- Account Management

## Professional Licenses & Certifications

- NASD Series 3, 7, 63, 66 Licenses
- Life, Variable Life, Annuity, Accident and Health Licenses
- Certified Long Term Care Consultant (CLTC)
- Certified Senior Advisor (CSA)

## VICE PRESIDENT – FINANCIAL SERVICES

**13 + years of experience in sales of investment and insurance products**

“Bill is one of the finest producers I have ever had on board...his energy, commitment and passion are unmatched. He and his team have been major contributors in growing our annuity business to where it is today.” *Senior Vice President of Sales, MetLife*

Top-producing sales professional and leader who has personally generated millions in premiums at record-breaking levels. Recognized as having a natural talent for developing and leading high-performance sales teams. Track record of cementing strategic alliances with influential agencies and wire houses that keep financial products ahead of the competition.

## HIGHLIGHTS OF ACHIEVEMENTS

### MetLife

- ▶ **Shattered all company and agency records with a score card of \$90 million** in new premium – a 45% increase over 2004 as a team leader who piloted a product awareness program with a focus on aggressive sales strategies.
- ▶ **Cultivated over \$40 million** in prospective trust, qualified, non-qualified, foundation and endowment assets in fee-based accounts within first year of company operations.
- ▶ **Recruited to head up a new asset retention program** – achieved a 70% retention rate within 12 months and protected retirement assets of \$550 million.

### Merrill Lynch

- ▶ **Led a team of sales professionals that were best-in-class**, amassing over \$60 million in new premium in 3 years.
- ▶ **Selected as 1 of 85 brokers out of 5000** to help launch a retirement funds retention program for expertise in asset allocation options from qualified plans.
- ▶ **Three-time GT Global World Class Director designee** for the highest rate of mutual fund and annuity production.

## PROFESSIONAL EXPERIENCE

METLIFE, Hartford, CT 1999 –Present  
**Vice President, Annuity Sales** (2003 –Present)

Serve as agency subject matter expert on all annuity related matters; develop business plans and set sales strategies. Train agents and affiliated brokers on products, commission structures and retention initiatives. Leverage home office relationships and network with key resources to achieve production goals.

- Groomed a team to become top-sellers nationally – 100 agents received GAMA awards in 2003 and 2004. Team raked in over \$90 million in new premiums.
- Led agents to surpass production goals by over 150% every year by crafting business plans that capitalized on emerging retirement plan changes.
- Developed a premium training program that emphasized proven, practical selling skills and prospecting systems.
- Introduced recruiting and retention initiatives that were adopted in 3 other divisions.

METLIFE, (Continued)

**Regional Sales Vice President, Northeast & Midwest Territories (2000–2002)**

Oversaw regional sales operations, territory and division management that covered 8 states and 19 agencies. Spearheaded innovative strategies to increase sales of life insurance and other financial asset management products in the development of estate plans. Coached and managed sales representatives in the integration of traditional life insurance business into managed trust accounts.

- Generated \$6 million in new revenues in one year by collaborating with independent agents to develop fee-based sales opportunities.
- Cultivated new business channels by joining forces with company's Blue Chip Group that grew renewal premiums by over 50% in a year.
- Introduced round table sessions across the region to foster exchange of competitive intelligence.

**Associate Vice President/Sales Manager – Retirement Funds Retention Program (1999–2000)**

Selected to implement a multi-million asset retention program for over 4400 corporate qualified plans that covered more than 500,000 participants. Managed all functions including training, compliance and marketing. Supervised 12 registered representatives and conducted performance evaluations.

- Championed creative strategies that retained pension funds and educated participants on retirement planning. Shielded 70% of program assets, surpassing industry norm of 50%.

MERRILL LYNCH, Springfield, MA

1992–1999

**Associate Vice President (1995–1999)/Financial Consultant (1992–1995)**

As financial consultant, marketed and sold fully array of financial products. Upon promotion, managed agency and broker networks for an enterprise with \$300 million in assets serving 300 retail accounts. Directed activities of 25 sales representatives and led all recruitment efforts. Developed business plans and marketing programs. Marketed and sold all aspects of financial products.

- Conceived of and implemented innovative selling and prospecting techniques that resulted in 20 out of 25 representatives earning highest sales in new business for 3 consecutive years.
- Hooked top talent from major competitors by introducing a lucrative rewards and bonus program.
- Recognized for expertise in retirement planning and investing. Asked to present a financial commentary on local radio station, WXYZ that reached a listening audience of 7000.
- Won several awards for ushering in over \$150 million in mutual fund and annuity business.

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**EDUCATION & TRAINING**

UNIVERSITY OF MASSACHUSETTS, Amherst, MA ~ **MBA in Business Administration**, 1998

WESTERN NEW ENGLAND COLLEGE, Springfield, MA ~ **BS in Finance**, 1991

~ Corporate Financial Training Workshops ~ Dale Carnegie – Sales and Public Speaking ~ NASD Continuing Education Courses ~ MetLife Insurance Training

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