

# JOSEPH B. JANIDLO, IV

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## ACCOUNT MANAGER

Insurance Broker | Strategic Account Partner | Client Relationship Builder

Results-driven account management professional with proven success in building and retaining long-term B2B relationships. Experienced in consultative sales, upselling, and compliance-driven industries. Skilled at uncovering growth opportunities, managing client portfolios, and delivering executive-level service. Adept at CRM reporting, contract oversight, and cross-functional collaboration. Recognized for balancing client advocacy with business growth targets.

### Key Skills

- Account Management & Retention
- B2B Sales & Upselling
- CRM Reporting & Data Integrity
- Strategic Client Presentations
- Relationship Development
- Compliance & Policy Oversight
- Prospecting & Business Development
- Executive Communication & Negotiation

### Professional Experience

#### INSURANCE BROKER & ACCOUNT MANAGER

Independent Brokerages | 2023 - Present

- Manage multi-state client base across life, health, Medicare, and annuity products, building long-term relationships through consultative solutions.
- Retain and expand accounts by identifying coverage gaps and upsell opportunities, consistently improving client satisfaction and revenue growth.
- Present customized solutions at an executive level, simplifying complex options for small business owners and individuals.
- Maintain accurate client records in CRM systems, ensuring compliance with state and federal regulations.

## **ACCOUNT MANAGER AND BENEFITS CONSULTANT – BANKERS LIFE**

Banker's Life | 2024 – 2025

- Built and retained a book of business in health, life, and retirement products through consultative sales.
- Conducted field and virtual client meetings, presenting tailored benefit packages to individuals and families.
- Developed trusted advisor relationships, resulting in referrals and ongoing account growth.
- Leveraged CRM for lead management, compliance tracking, and performance reporting.

## **AUDITOR - POLICY REVIEWER & QUALITY CONTROL SPECIALIST**

Bureau of Unclaimed Property, PA Department of Treasury | 2022 – 2023

- Oversaw reconciliation of 6,000+ insurance policies locked in the state treasury vault.
- Increased efficiency and accuracy by reviewing 55 internal reports in 4 months, ensuring families regained unclaimed assets.
- Independently contacted carriers, verified policy amounts, and managed confidential records with precision.
- Acted as key liaison between treasury officials and beneficiaries, balancing compliance with service excellence.

## **EDUCATION**

- Bachelor of Arts in Philosophy – Gannon University (Cum Laude, GPA 3.5)
- Studies in Psychology of Human Behavior – Southern New Hampshire University (GPA 4.0)

## **LICENSES & CREDENTIALS**

- Life, Health and Fixed Annuities (KY, OH, CO, FL, IA, IL, IN, MD, MI, PA, TX, WI)
- Commissioned Notary Public, State of Kentucky

## **PROFESSIONAL BRANDING**

Founder of **JB4.com** – personal professional hub integrating insurance, notary, and client services. Demonstrates executive presence, strategic branding, and digital client engagement.

**FULL PROFESSIONAL PORTFOLIO IS AVAILABLE ON MY WEBSITE AT:**

**[HTTPS://WWW.JB4.COM/RESUME-WWEX](https://www.jb4.com/resume-wwex)**

