

# JOSEPH B. JANIDLO, IV

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## SENIOR ACCOUNT MANAGER — COMMERCIAL LINES

Licensed Health & Life Insurance Broker | Actively Pursuing Property & Casualty (P&C) License

Insurance professional with 7+ years' experience across commercial and personal lines, managing large books of business, directing account workflows, and delivering client-focused solutions. Proven ability to lead account teams, resolve complex service issues, and ensure retention through technical coverage analysis and renewal strategy. Recognized for strengthening compliance, improving operational efficiency, and expanding offerings across multiple carriers. Licensed in 12 states for Health & Life; actively pursuing P&C license.

## CORE COMPETENCIES

- Book of Business Oversight (600+ Active Accounts)
- Team Leadership & Workflow Direction
- Policy Administration, Renewals & Expirations
- Coverage Analysis & Risk Evaluation
- Billing Resolution & Claims Coordination
- Compliance, Audit-Ready Documentation
- CRM / AMS Data Accuracy (RSM, Sunfire, Benefit Point, Carrier Portals)
- Client Retention, Service Excellence & Cross-Team Communication

## PROFESSIONAL EXPERIENCE

### **HEALTH INSURANCE ASSOCIATE – HUB INTERNATIONAL**

Cincinnati, OH | Feb 2025 – Aug 2025

- Managed a book of 600+ active accounts, overseeing renewals, expirations, and client retention across multiple lines.
- Directed daily workflows and collaborated with account teams to resolve complex service issues.
- Delivered technical coverage analysis, billing support, and claims coordination.
- Redesigned processes to improve CRM/AMS data accuracy and compliance readiness.
- Launched a Life Insurance division, expanding offerings and strengthening client relationships.

**INSURANCE AGENT – BANKERS LIFE**

Harrisburg, PA | 2024 – 2025

- Supported two sales teams during high-volume enrollment periods, coordinating outreach and administrative workflows.
- Managed client servicing across multiple carriers, including billing, claims, and policy changes.
- Ensured accuracy across CRM and carrier systems, monitoring renewals and expirations.

**INSURANCE BROKER – NÜ LIFE HEALTHCARE (RSM)**

Mechanicsburg, PA | 2023 – 2024

- Trained and mentored new agents on compliance, documentation accuracy, and service standards.
- Monitored suspense items and implemented accountability measures to ensure timely client servicing.
- Achieved national recognition for client retention and service excellence.

**POLICY REVIEWER & QUALITY CONTROL SPECIALIST – PENNSYLVANIA**

TREASURY DEPARTMENT

Harrisburg, PA | 2022 – 2023

- Charged with the auditing of over 6,000 insurance policies in the Bureau of Unclaimed Property's vault, verifying status, coverage, and beneficiaries.
- Coordinated with carriers to update records and supported families in reclaiming tangible policy assets.
- Maintained strict documentation standards across 55 internal reports while meeting regulatory deadlines.

**EDUCATION & CREDENTIALS**

- Licensed in 12 States: Health & Life (Accident, Health, Life, and Fixed Annuities)
- Actively pursuing Property & Casualty (P&C) License
- AHIP Certified: 2024, 2025, 2026
- 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)

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

<https://www.JBJ4.com/resume-IOA-SeniorAccountManager>