

# Akil Dasorwala

INSURANCE SALES ADVISOR – Sales, Identity Access Management, Property & Casualty Insurance

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## SKILLS

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- **GPS – Guided Policy System:** Navigated GPS platform to process quotes, bind policies, and track client records.
- **Policy Coverage Configuration:** Interpreted auto and home policy details like endorsements, limits, deductibles.
- **Risk-Based Policy Structuring:** Analyzed profiles to align coverage with risk level and underwriting guidelines.
- **Quote Generation & Binding Tools:** Produced accurate insurance quotes and issued policies via internal platforms.
- **Multi-Product Insurance Packaging:** Analyzed digital tools to bundle auto, home, extras for pricing optimization.

## WORK EXPERIENCE

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### Insurance Advisor

April 2021 – June 2023

*TD Insurance*

*Canada*

- Licensed to offer 2 home and 2 auto insurance policies in Ontario, addressing 180+ monthly client requests while adjusting every available option to match vehicle, legal, household criteria aligned to underwriting rules without failure.
- Delivered 14 new cross-sales weekly by analyzing residence type and driving record, suggesting optional bundled coverage tiers. Achieved \$22K monthly uplift from upgrades spanning renewals, first-time clients, dual-vehicle households.
- Surpassed 129% of assigned targets for 6 straight quarters by enrolling 75+ eligible clients per cycle and submitting validated documents on time. Completed review tasks without errors across each audit and compliance requirement.
- Generated 30+ detailed quotes every week, covering 6 breakdown sections including value, risk class, deductible, discount eligibility, and coverage limits. Completed average policy confirmation calls within just 12 minutes or fewer.
- Processed 9,200+ transactions across endorsement, cancellation, and address changes. Tracked all premium adjustments with accuracy, sustaining monthly error count below 0.4% during routine audits performed by internal control teams.
- Coordinated 20 licensed insurance advisors across 2 major underwriting rollouts, assigning 4 distinct task types and reviewing 7 team check-ins daily across 3 roles while tracking submitted progress logs and open requests without delay.
- Instructed 15 new advisors using call scripts, product FAQs, escalation charts, and feedback recordings. With precision reduced onboarding hours by 33% while maintaining 100% exam pass rate across 6 weeks of internal training cycles.
- Resolved 85 complex complaints from 8 regional offices by listening to call logs, identifying recurring error patterns, tagging incident codes, and closing every service case within 2 working days across shared support system queues.
- Designed 25 presentations quarterly in PowerPoint, charting volume by policy type, reason category, and region. Compared quarterly outcomes to forecasts using structured visuals and dual-axis bar-graph projections for reviews.
- Managed 3 high-risk claims per shift involving flood, theft, or liability, routing cases within 10 minutes systemwide.

### Financial Sales Representative

September 2019 – April 2021

*PC Financial*

*Canada*

- Engaged 80+ mall visitors per day, presenting core credit card features like caps, interest duration, and point usage. Opened 15+ approved accounts weekly after identity verification and signature review without exception or rejection.
- Presented President's Choice products to 4 distinct customer segments using behavior data and transaction patterns. Boosted average conversion rate by 36% compared to past seasonal cycles tracked using sales metrics, log comparisons.
- Enrolled 1,200+ individuals over 19 months by explaining application flow, eligibility steps, and benefit structures. Walked through 3 available financial packages matched to transaction habits, income levels, and client account types.
- Addressed 65 walk-in inquiries per week about billing periods, missed payments, and utilization history. Provided issue resolution by checking each profile log, validating policy terms, and confirming entries without management escalation.
- Scanned 50+ verified profiles every week using ID cards, postal records, and employer forms. Uploaded all personal details into CRM systems while achieving 100% approval match against internal criteria and documentation standards.
- Achieved 110% of biweekly sales targets for 9 consecutive periods by promoting benefit options, calculating all limits, and resolving eligibility doubts. Maintained account approvals with under 5% rejections following credit assessments.
- Protected sensitive client records across 3,500+ forms by controlling system access, applying necessary restrictions, and updating permissions quarterly. Deleted non-production entries within 24 hours to meet internal compliance protocols.
- Compiled 14 quarterly feedback decks for senior staff, highlighting visitor data, signup success, ranking outcomes. Used annotated bar charts and manual tallies to compare each teammate output against individual benchmark standards.
- Addressed 6 associates during major holiday events, switching booth posters, setting up stands, and issuing 250+ promotional flyers each shift. Aligned campaign materials to product descriptions for clear on-site customer messaging.
- Matched 100+ rejected forms to revised coverage plans by adjusting terms, raising approval rates to 57% in 4 months.

## EDUCATION

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### Business Management

January 2017 – September 2018

*Lambton College, Toronto, ON, Canada*

### Bachelor of Commerce

June 2013 – April 2016

*Mohanlal Sukhadiya University, India*