

DAVID M. BAILEY, PGK, FDD, CSA, FICF, AAI, LUTC
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(509) 924-4499

RESUME

FIELD AGENT - KNIGHTS OF COLUMBUS

2003-Present – It is my obligation to offer a comprehensive Financial Needs Analysis, a Post or Pre-Retirement Income Analysis and a Long Term Care Pre-Need Assessment to my members annually. Through good planning, my members can be assured enough CASH in the event of an early death, enough CASH to cover Long Term Care and enough CASH to live well in their Retirement Years.

GENERAL AGENT - KNIGHTS OF COLUMBUS

1996-2003 - As a General Agent I Recruited, Trained and Motivated Field Agents to service the Membership of the Knights of Columbus in my Jurisdictions in the area of Policy Evaluation, Fraternal Benefits, Long Term Care and Retirement Planning.

FIELD AGENT - KNIGHTS OF COLUMBUS

1993-1996 - As a Field Agent I called on my assigned member Knights to offer the services of the Agency Department. My duties were to do a review of the benefits offered by the Knights of Columbus, answer any questions that may arise on any insurance matters and do an in depth comprehensive analysis of each members insurance holdings and needs. I Received the Agent of the Year award for Washington State for 1994.

AGENCY OWNER - RECRUITING, SALES & MARKETING

1989-1993. As Owner of Benefit Alternatives I had the responsibility of recruiting, training and motivating my sales force in the production of Life and Health related products. This was done in seminar format. Our sales force of 168 affiliated agents managed the contracts for over 1,680 locally owned businesses.

PRODUCTION-MARKETING MANAGEMENT

1987-1989. As Vice President of Eaton * Bailey Insurance, Inc., I had the supervisory authority for marketing, production and sales management of all Personal Lines, Life, Health and Financial Services. I developed a successful life and group health insurance marketing program and constructed several spread sheets for insurance carrier benefits comparisons.

AGENCY HEAD-SALES MANAGEMENT

1981-1987. As President of Bailey Insurance Agency, Inc., I was supervisory authority for all agency functions to include both sales and management. Developed a scratch agency into a \$400,000 agency before its merger with Eaton Insurance in 1987. Developed several marketing and training programs to concentrate sales efforts in the area of life, health and property and casualty insurance related products.

ACCOUNT EXECUTIVE

1978-1981. As an Account Executive with the De Leon Insurance Agency, Inc., I was responsible for Personal, Commercial, Life, Health and Financial Services production on new clients to the agency. I developed and expanded several marketing programs to produce new accounts until the agency was sold in 1981.

David M. Bailey, PGK, FDD, CSA, FICF, AAI, LUTC Cont'd

REGISTERED SALES REPRESENTATIVE

1972-1978. As a Registered Sales Representative for Metropolitan Life Insurance Company it was my responsibility to service existing accounts and to sell a complete financial services product line to new individuals and businesses. I was licensed for property & casualty in 1976 to expand my expertise in Total Financial Planning.

CIVIC INVOLVEMENT

Board of Directors - Independent Agents & Brokers of Spokane - 1979-1987;
Charter Grand Knight - Knights of Columbus Council #8201 - 1982-1984;
President - Sunrise East Lions - 1984-1985;
Spokane County Insurance Advisory Committee - 1984-1986;
President - Independent Insurance Agents & Brokers of Spokane - 1985-1986;
Knights of Columbus - District Deputy #18 - 1985-1987;
Chairman - Spokane Valley Chamber of Commerce Business Ed. Committee - 1988-1990;
Board of Directors - Spokane Valley Chamber of Commerce - 1989-1992;
Partners Program Advisory Council - 1990-1993;
Spokane Economic Development Council - Local Business Affairs Committee - 1990-1992;
President - Spokane Association of Health Underwriters - 1992-1993.
Secretary/Treasurer - Spokane Association of Insurance & Financial Advisors – 2003 - 2004
Vice President - Spokane Association of Insurance & Financial Advisors – 2004-2005
President-Elect - Spokane Association of Insurance & Financial Advisors – 2005-2006
Administrator/Treasurer – Spokane Association of Insurance & Financial Advisors – 2006-Present

EDUCATION

Graduate, Sales Training Incorporated – 1972,
Graduate, Life Underwriter Training Council, (LUTC) – 1979,
Graduate, City College - Degree in Sales Management and Marketing – 1979,
Graduate, Aetna Home Office Sales & Marketing School – 1980,
Graduate, Accredited Advisor in Insurance, (AAI) – 1986,
Graduate, Fraternal Insurance Councilor (FIC) 1995,
Graduate, Fraternal Insurance Counsellor Fellow (FICF) 2003.
Graduate, Certified Senior Advisor (CSA) 2006

AWARDS AND ACHIEVEMENTS

Eagle Scout – September 1963,
Honorably Discharged - U.S. Air Force – 1971,
Rookie of the Year, Metropolitan Life – 1973,
Knights of Columbus - New Development Council Award – 1985,
Knights of Columbus - Star District #18 - 1985-1986,
Knights of Columbus - 3rd Place District Deputy Award District #18 - 1985-1986,
Member, NAHU, Leading Producers Round Table, LPRT - 1991-1992-1993,
Trustee, Knights of Columbus, Council #8201 - 1985-1986-1987/1990-1991-1992,
Knights of Columbus Washington State Agent of the Year - 1994.
Member of the Knights of Columbus VIP 75 Club 2007
NAIFA-Spokane “Member of the Year” for 2006-2007