

Candidate 3987

Financial Services Licensed Agent

OH

Life, Accident, & Health Insurance
Property & Casualty Insurance

Willing to relocate to: Sandusky, OH - Cleveland, OH
Authorized to work in the US for any employer

Work Experience

Property & Casualty License

Allstate Insurance

February 2020 to Present

- Sales & Prospecting new business
- Cold calling
- Customer service
- Reviewing insurance needs
- Explaining insurance coverage to clients
- Financial planning

Licensed Health and Life Insurance Agent

Self-Employed - Ohio

December 2018 to Present

- Financial planning for families
- Building client relationships
- Building relationships with insurance carriers
- Organizational & time management skills
- Scheduling appointments
- Computer software skills
- Field underwriting
- Working with small businesses to enroll employees in benefits
- Retirement planning
- Exemplary communication skills
- Reviewing & assessing financial needs of clients and

Education

Associate in Life, Accident, & Health Insurance

Xcel

November 2018 to December 2018

Associates in Allied Health

Community College - OH

High school diploma or GED

Skills

- Medical Terminology (6 years)
- Customer Service (10+ years)
- Management (10+ years)
- Networking (10+ years)
- Public Speaking (10+ years)
- Relationship Management (10+ years)
- Sales (10+ years)
- Training (10+ years)
- Organizational Skills
- Quick Learner
- POS
- Insurance Sales
- Upselling
- CRM Software
- Financial Planning
- Underwriting
- Customer Relationship Management
- Marketing
- Time management
- Presentation Skills
- Intake
- HIPAA
- Financial Services
- Cold Calling
- Office Management
- Business Development
- Bartending
- Filing
- Software troubleshooting
- Communication skills
- Microsoft Excel
- Microsoft Office
- Microsoft Word
- Inside sales

- Financial acumen
- Leadership
- Outside Sales
- Strategic Planning

Certifications and Licenses

Licensed Managing Esthetician

April 2004 to September 2018

Property & Casualty License

March 2020 to December 2023

License is current and up to date

Insurance Producer License

Life and Health Insurance

December 2018 to October 2022

State license to sell Life, Accident, and Health insurance.

Assessments

Inside sales — Proficient

January 2021

Understanding and responding appropriately in sales scenarios, and performing common sales calculations

Full results: [Proficient](#)

Sales skills — Proficient

November 2020

Influencing and negotiating with customers

Full results: [Proficient](#)

Sales fit — Proficient

August 2021

Measures the traits that are important for success in sales positions

Full results: [Proficient](#)

Written communication — Proficient

April 2022

Best practices for writing, including grammar, style, clarity, and brevity

Full results: [Proficient](#)

Supervisory skills: Motivating & assessing employees — Proficient

August 2021

Motivating others to achieve objectives and identifying improvements or corrective actions

Full results: [Proficient](#)

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Additional Information

I have a background in both P&C and life and health insurance. I am serious about helping clients protect themselves and their families through insurance coverage. I believe client relationships are vital to a successful Insurance business.