

# Direct Hire: 4821 \*\* 4-7 LIFE/HEALTH APPS/MONTH \*\*

Licensed Insurance Agent

*Detail-oriented professional with 8+ years of experience in conflict resolution, customer communication, and relationship management. Eager to leverage my skills in the customer service role at your company.*

## EXPERIENCE

### State Farm

*August 2021 - Present*

Licensed Insurance Agent

- Network and build relationships with existing and potential clients.
- Assist with incoming calls to provide solutions for client needs.
- Offer guidance on State Farm products and services to manage everyday risks.
- Ensure fulfillment of policy requirements and assist in resolving claims.
- Educate customers of all ages on services for proper lifestyle protection.
- Follow up quickly with leads and complete daily tasks in a timely manner.

### Metal Works

*June 2016 - August 2019*

CEO Assistant

- Prepare invoices, reports, memos, and financial statements using various software tools; answer and direct phone calls, taking messages as necessary.
- Attend meetings to record minutes and analyze incoming memos and reports for significance and distribution.
- Perform general office duties, including ordering supplies, maintaining records management systems, and basic bookkeeping; file and retrieve corporate documents and manage travel arrangements for executives.
- Coordinate office services related to records, finances, and personnel issues while maintaining executives' schedules and processing payroll information.
- Establish and oversee administrative policies and procedures, reviewing operational practices for potential improvements.

### Wells Fargo

*March 2014 - June 2017*

Personal Banker/Service Manager

- Analyze applicants' financial status, credit, and property evaluations to assess loan feasibility and compile necessary documentation.
- Meet with applicants to gather information for loan applications, explain available loan types and terms, and answer questions about the process.
- Handle customer complaints effectively and stay updated on new loan products and financial services to better serve clients.
- Submit applications to credit analysts for verification, confer with underwriters to resolve mortgage application issues, and develop referral networks to identify potential loan prospects.
- Market bank products to individuals and firms, promoting services tailored to customer needs while helping clients identify and achieve their financial goals.

## EDUCATION

### University

Bachelor's in English

## SKILLS

Professional Skills: Risk Analysis, Insurance Claim Processing, Customer Relationship Management, Professional Customer Services, Knowledge of Finance, Financial Planning, Financial Underwriting, Insurance Management and Aftercare, Banking Services, Insurance Sales, Customer Service, Business Relationship Management.

## CERTIFICATIONS

### P&C and Life & Health Licensed

State of Georgia