

Direct Hire: 4704 ** 3-5 LIFE APPS/MONTH **

Licensed Office Manager

EXPERIENCE

State Farm

March 2022 - June 2024

Office Manager

- Licensed Producer in Property, Causality, Life, and Health Insurance
- Proficient in sales, lead calling, service, and basic claims
- Excellent product knowledge
- Resolve problems or discrepancies concerning customers' policies and/or payment accounts
- Proficient in policy changes
- Receive checks and cash for deposit, verify amounts, and check accuracy of deposit slips
- Assist managing a small office of 4 employees, track PTO and scheduling appointments

Loan Service

August 2021 - December 2021

Consumer Loan Consultant / Teller I

- Resolve customer account issues, process deposits, and examine checks for accuracy and legality.
- Handle transactions like term deposits, loan funding, reversals, payoffs, and balance cash drawers daily.
- NMLS Certified Lender and Notary Public, troubleshoot loan/card issues, open new memberships, make loan decisions, and recommend products while educating members on services.

Credit Union

October 2019 - July 2021

Financial Service Representative II / Loan Servicing Representative I

- NMLS Certified Lender and Notary Public, proficient in consumer loans, HELOC funding, payment setups, loan reversals, and file maintenance.
- Experienced in resolving loan and card issues, handling new memberships, and making loan approval decisions within authority.
- Skilled in multitasking across various programs to meet member needs and ensure a positive experience, including recommending products and educating members on services like online banking, mobile apps, and fraud prevention.

EDUCATION

High School

High School Diploma

CERTIFICATIONS

P&C and Life & Health Licensed

State of Maine

NMLS Certified Lender

REQUESTED COMPENSATION

Desires a Sales or Hybrid role @ \$40-45k+ base, with the ability to earn \$65k+ total

ROLES & ACTIVITIES

Reports: 35-45 items/\$25-35k premium/month State Farm 2.3 years

Will work REMOTE ONLY in EST

50+ outbound dials/day, 40+ inbound calls with live lead transfers, re-quotes, pivot and cross selling, bundling, win-backs, referral selling, office and sales management, customer service, & reports selling 3-5 new life policies/month.