

Candidate 4306  
TX

February 26, 2024

Mr./Mrs. Hiring Manager

Dear Mr./Mrs. Hiring Manager, As requested by you, I am attaching my resume with this letter for your consideration.

I am in search of such a position, and I can bring to the job my experience as a current ***Financial Broker, State Farm Insurance Sales Rep, Relationship Manager & Business Owner Specialist (RM&BOS), and United States Marine*** where I build relationships with clients while processing their transactions, meeting my daily goals, handled cash on daily basis and always reconciled the intake at the end of each day. As indicated in the enclosed resume, I possess sales experience, great enthusiasm, commitment to excellence, remarkable set for punctuality and a sense of responsibility.

My key competencies related to my work as a ***Financial Broker, State Farm Insurance Sales Rep, Relationship Manager & Business Owner Specialist (RM&BOS), and United States Marine*** include.

- **Active P&C Insurance License**
- Outstanding numeric ability
- Experience driving revenue based on the ability to deliver needs-based solutions to clients.
- Outstanding Leadership Skills
- Experience building relationships with small business and consumer clients.
- Ability to meet sales goals/quotas.
- Problem-solving skills
- Strong time management skills
- Strong stress management skills
- Outstanding communication skills
- Attention to detail.
- Ability to work in a team.
- **Fluent in 2 languages (English and Spanish)**

I am positive that these skills and abilities make my candidacy stronger than others. I look forward to further discussion where I can demonstrate my passion in becoming an integral member of your bank.

Thank you for your time and consideration.

Sincerely, Candidate 4306

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## OBJECTIVE

Analytic self-starter looking for a position at your *Insurance Agency*. Bringing proficiency and experience in sales financial needs assessments and using consultative approaches to retain business and consumer customers and build effective customer relationships.

## PROFESSIONAL SUMMARY

Administrative and Customer Service Support Professional with 3+ years of proven ability to interact and collaborate with multiple levels of customer service, management and diverse cultural audiences while working for Bank of America as a Relationship Manager & Business Owner Specialist Specializing in Building Relationship for both business and consumer clients as well as meeting sales goals/quotas. Prior served in the United States Marine Corps, consistently achieving exceptional and measurable results supporting teams of 4 personnel in a dynamic, fast-paced environment. Possess operations in Iraq and Afghanistan. Managed risk upon multiple lines to protect assets, property and equipment valued over \$1M. Career supported by Department of Defense training and vast operational experience.

### Capital – Texas

March 2023 – February 2024

- Pre-qualify clients for our relief program by engaging with potential clients and assessing their suitability for our program parameters.
- Utilize your expertise in Merchant Cash Advance to guide clients through the process and provide ongoing support.
- Maximize your earnings through a commission-based system based on the final debt balance of each closed deal.

### State Farm – Texas

Dec 2020 – March 2023

#### Team Leader – Sales Representative

- Establish customer relationships and follow up with customers, as needed.
- Use a customer-focused, needs-based review process to educate customers about insurance options.
- Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.

### Bank of America – Texas

Apr 2017 – Nov

#### 2020 Relationship Manager & Business Owner Specialist (RM&BOS)

- Uncovering the banking needs of both small business and consumer customers.
- Building relationships over time to gain in-depth knowledge of clients' personal and business priorities, financial life priorities, and effectively positioning additional Bank of America products and services.
- Successful track record of meeting sales goals/quotas.
- Help drive revenue based on the ability to deliver needs-based solutions to business and consumer clients.

### United States Marine Corps – Various Locations

Nov 2011 – Apr 2017

#### Security Team Lead

- Evaluated terrain and topographical information to include maps, overlays, and graphs to gain the most advantageous positions to achieve mission accomplishment.
- Managed and trained a team of 4+ in classroom and hands on training in analyzing activities to evaluate safety hazards and mitigated risk for patrols and convoys.

## EDUCATION

College Associates in Finance 2017-2020  
U.S. Marine Corps, Leadership Training – 2014  
High School, Diploma – 2011