

Bilingual Spanish Hire: 4893 **2-3 LIFE APPS/MONTH**

Licensed Account Manager

EXPERIENCE

State Farm

December 2019 to current

Licensed Account Manager

- Provide exceptional customer service by addressing inquiries and ensuring customer satisfaction.
- Process payments accurately and efficiently.
- Expertise in utilizing NECHO software.
- Generate sales leads and close deals in both insurance and financial services.
- Work towards obtaining FINRA Series 5 and 6 licenses to expand expertise.
- Make policy changes and updates to meet customer needs and ensure coverage.
- Assist in completing PFA (Producer Financial Applications) for the agent to streamline processes.

State Farm

July 2019 to December 2019

Licensed Team Member

- Provide outstanding customer service by addressing inquiries and resolving issues.
- Process payments accurately and efficiently
- Utilizing Necho software.
- Generate sales leads and close sales in various insurance products.
- Make changes to policies as needed to ensure customer satisfaction and coverage accuracy.

Insurance Company

March 2019 to July 2019

Assistant Manager

- Assist with opening and closing the store on time, ensuring all operational tasks are completed efficiently.
- Help with scheduling, training/coaching, reporting, and delegating tasks to maintain smooth operations.
- Maintain open lines of communication with team members to promote collaboration and workflow efficiency.
- Assist customers with various insurance needs, providing clear and helpful answers to all questions and inquiries.

EDUCATION

College

Associate's Degree

CERTIFICATIONS

P&C, Life & Health Licensed in State of TX

ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 30-40 policies/\$40-50k premium/month

Will work REMOTE in any time zone or in-office near Dallas, TX 75217

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

Seeks a remote or in-office opportunity. 80+ outbound dials/day, 30+ inbound calls/day, pivot and cross selling, referral sales, lead generation, bundling, customer service & reports selling 2-3 new life policies per month.

SKILLS

- Professional Skills: Consulting, Financial Underwriting, Insurance Sales, Accounting, Cold Calling Sales, Customer Account Management, Customer Relationship Management, Region Management, Sales Management, Training Activities, Negotiation Skills, Sales, Call Centers, Customer Service, Customer Support, Marketing IT Skills: Microsoft Office, Salesforce.Com