

Direct Hire Candidate: 4837

Licensed Account Executive

EXPERIENCE

Insurance Agency

May 2024 - October 2024

Licensed Account Executive

- Re-shop policies to save customers money through various carriers.
- Cross-sell policies to create bundled coverage options for clients.
- Problem-solve issues as needed to ensure customer satisfaction.
- Perform quality control on new policies to ensure accuracy and completeness.

Allstate

January 2018 - May 2024

Licensed Commercial Insurance Agent

- Manage daily tasks for the agency effectively.
- Write new business for homes, autos, and umbrella policies; refer clients for life insurance.
- Conduct policy reviews with customers to ensure adequate coverage.
- Assist clients with the claims process and problem-solve issues while providing viable options.
- Respond to emails promptly to maintain communication.
- Provide excellent results with a high attention to detail in all tasks.

Insurance Company

July 2018 - December 2018

Licensed Insurance Agent

- Work with customers to obtain commercial insurance coverage.
- Prepare Acords and complete applications or supplemental documents as requested.
- Bind coverage and provide problem-solving assistance as needed.
- Prepare financial agreements to finalize transactions.

Allstate

November 2015 - July 2018

Licensed Insurance Agent

- Wrote and serviced all lines of Property and Casualty products and policies.
- Performed policy renewal reviews with customers, providing trusted advice.
- Accurately processed all policy endorsements while adhering to underwriting standards.
- Provided prompt and professional resolutions in the claims process from start to finish.
- Assisted in customer conflict resolution as required.

EDUCATION

University

Associate Degree

SKILLS

- Professional Skills: Insurance Claim Processing, Commercial Insurances, Business Development, Sales, Quality Control, Financial Underwriting, Insurance Sales, Accounts Payable, Accounts Receivable, Cold Calling Sales, Negotiation Skills, Upselling Skills, Office Management, Conflict Resolution, Marketing, Customer Relationship Management, Time Management, Typing Skills, Medical Terminology, Insurance Management and Aftercare, Knowledge of Finance, Business Relationship Management, Customer Account Management, Sales Management, Team Building, Customer Service, Carrying out Assessments, Nursing IT Skills: Salesforce, Microsoft Office, Microsoft Windows, Microsoft Excel, Microsoft Outlook

CERTIFICATIONS

P&C Licensed in the State/s of TX, PA