

Bilingual Spanish Hire: 4951

Licensed Remote Insurance Agent

EXPERIENCE

Insurance Company

August 2023 - Present

Personal Lines Account Manager

- Focus on policy renewal reports and customer retention efforts.
- Expert in submitting California Fair Plan and DIC (Difference in Conditions) policies.
- Quote, sell, and bind new insurance policies to meet customer needs.
- Advise prospects on appropriate insurance coverage and options based on their specific circumstances.
- Service and manage existing customer policies, including handling policy changes and updates.

Insurance Company

March 2022 - July 2023

Remote Insurance Agent

- Handle live call transfer sales through SmartFinancial and QuoteWizard platforms.
- Quote, sell, and bind new insurance policies in Texas.
- Accurately document and update all customer information.

Allstate

March 2021 - March 2022

Licensed Remote Insurance Agent

- Focus on policy renewals, retention, and reviewing reports to ensure customer satisfaction.
- Expertly handle CALIFORNIA Fair Plan and DIC submissions.
- Quote, sell, and bind new insurance policies tailored to customer needs.
- Advise prospects on the best insurance coverage options based on their unique circumstances.
- Service existing customer policies, including making necessary policy changes.
- Manage live call transfer sales through the SmartFinancial platform to drive new business.

Insurance Company

2012 - February 2021

Office Manager

- Trained multiple insurance agents and customer service representatives to enhance team performance.
- Organized and maintained insurance files and customer profiles for easy access and retrieval.
- Wrote various types of insurance policies, including Auto, Home, Renters, Boat, and Motorcycle.
- Trusted with managing daily deposits to ensure financial accuracy and security.
- Created and analyzed monthly sales graphs to track performance and identify growth opportunities.
- Reviewed all insurance policies prior to submission to ensure accuracy and compliance.
- Effectively resolved customer service issues, ensuring client satisfaction and retention.

CERTIFICATIONS

P&C, Life & Health Licensed in the States of CA & TX

ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 30-40 items/\$30-40k premium/month

Will work REMOTE in PST & CST time zones

Desires a Sales or Hybrid role with an Allstate Agency @ \$40-45k base, with the ability to earn \$55k+ total

100+ outbound dials/day, 20+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, and customer service.