

# Bilingual Spanish Hire: 4950

Licensed Account Manager

## EXPERIENCE

### Allstate

July 2024 - Present

Licensed Account Manager

- Developed and managed a portfolio of clients, delivering tailored insurance solutions.
- Conduct needs assessments to recommend appropriate coverage options and ensure comprehensive protection.
- Generated leads through various channels, including referrals, networking events, and cold calling, contributing to business growth.
- Built and nurtured strong client relationships by providing exceptional service and addressing inquiries or concerns.
- Collaborated with underwriters to negotiate favorable policy terms while ensuring compliance with company guidelines.
- Performed thorough risk assessments to determine accurate coverage requirements.
- Educated clients on the features, benefits, and exclusions of different policies to facilitate informed decision-making.
- Managed policy renewals by proactively contacting clients and offering updated coverage options.
- Effectively cross-selling additional insurance products to existing clients.
- Utilized CRM to track client interactions, manage leads, and maintain accurate records.
- Participated in ongoing training programs to stay informed about industry trends, products, and regulatory changes.
- Collaborated with claims adjusters to ensure timely resolution of claims while adhering to company procedures.

### Allstate

Licensed Sales Producer

- Serve as a licensed sales producer handling both inbound and outbound sales leads in an office setting.
- Effectively engage with potential clients, providing insurance solutions and addressing their needs.
- Manage client inquiries, process sales, and follow up to ensure satisfaction and retention.
- Utilize strong communication skills to explain policy options and guide clients through the decision-making process.

### Insurance Company

August 2022 to August 2023

Licensed Remote Customer Service Representative

- Provide licensed remote customer service for auto, home, and umbrella insurance policies.
- Assist customers with inquiries, policy changes, claims, and coverage options.
- Handle billing inquiries, process payments, and manage policy renewals.
- Guide clients in selecting appropriate insurance products based on their needs and preferences.

### Insurance Company

January 2012 - May 2022

Receptionist/Processor Agent

- Process personal lines payments and submit renewal offers via email and mail.
- Manage billing for escrow accounts and verify renewal information with mortgage companies.
- Handle renewals through various underwriters.
- Deposit payments and maintain accurate account records.
- Mail out cancellations, overpayment refunds, and send reminder notices to clients.

## CERTIFICATIONS

### P&C Licensed in the State of TX

## ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 20-30 items/\$20-30k premium/month

Will work REMOTE in CST and EST time zones

Desires a Hybrid role with an Allstate Agency @ \$40-45k base, with the ability to earn \$60k+ total

60+ outbound dials/day, 30+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, and customer service.