

Bilingual Spanish Hire: 4962 **2-3 LIFE APPS/MONTH**

Licensed Team Member

EXPERIENCE

Health Services

October 2023 - Present

Referral Coordinator

- Reviewed patient records to determine appropriate referrals based on medical necessity and insurance requirements.
- Communicated with patients, healthcare providers, and insurance companies to gather necessary information for referrals.
- Ensured timely submission of referral requests to specialists or other healthcare facilities.
- Followed up on pending referrals, ensuring they were completed within designated timeframes.
- Maintained accurate and organized referral documentation in the electronic health record system.
- Assisted with obtaining prior authorizations from insurance companies for specialty procedures or treatments.
- Ensured compliance with HIPAA regulations while handling sensitive patient information during the referral process.

State Farm

July 2022 - Present

Licensed Team Member

- Explained various insurance policies and products to both potential and existing clients, helping them choose the most suitable coverage for their needs.
- Assistance with all lines of insurance. Issued quotes, maintained client records, prepared reports, and responded to inquiries regarding insurance plans and policies.
- Possess strong skills in the insurance industry, leveraging expertise to provide tailored insurance solutions.
- Cultivated a friendly and approachable personality with excellent interpersonal and sales skills.
- Showcased a resilient spirit and persistent nature in achieving sales and service goals.
- Utilized strong analytical skills with a goal-oriented mindset to assess client needs and provide effective solutions.
- Proven ability to network and build long-lasting relationships with clients and industry partners.
- Maintained regular contact with existing clients to discuss renewals, add-ons, and policy updates.
- Stayed up to date with market trends and best practices within the insurance industry.
- Provided a service role as needed, ensuring clients received the support they required.

Banking Services

February 2019 - July 2022

Customer Service Representative

- Provided exceptional customer service by assisting clients with inquiries regarding checking, savings, and loan products.
- Assisted clients in setting up and managing accounts, ensuring proper documentation and compliance with bank policies.
- Addressed and resolved customer issues, including account discrepancies, loan inquiries, and general banking questions.
- Managed and updated customer accounts, ensuring accurate records for future reference and auditing purposes.
- Responded to inquiries via phone, email, and in-person, providing clear and accurate information on account balances, transactions, and policies.
- Ensured compliance with banking regulations, maintaining confidentiality and security of sensitive client information.

EDUCATION

High School

Diploma

CERTIFICATIONS

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

ROLES, ACTIVITIES AND DESIRED COMPENSATION

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

Will work REMOTE in any time zone

Desires a Sales or Hybrid role with a State Farm Agency @ \$40-45k base, with the ability to earn \$60k+ total

30+ outbound dials/day, 40+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, customer service & reports selling 2-3 new life policies per month.