

# Direct Hire Candidate: 4959 \*\*4-5 LIFE APPS/MONTH\*\*

Licensed Producer & Customer Service Agent

## EXPERIENCE

### State Farm

January 2019 to Current

Licensed Producer & Customer Service Agent

- Perform data entry and manage billing, including processing changes and payments.
- Process and direct incoming faxes and emails, ensuring timely communication.
- Clear outstanding conditions from underwriters and screeners as part of the service management duties.
- Explain various insurance policies and products to potential and existing clients.
- Issue quotes, maintain client records, prepare reports, and address client inquiries.

### Child Care Services

September 2017 - May 2019

### State Farm

April 2016 - August 2017

Licensed Producer & Customer Service Agent

- Handle data entry tasks and oversee billing activities, including processing modifications and payments.
- Organize incoming mail and manage the processing of payments across multiple accounts.
- Perform nightly deposits into various accounts and procure necessary supplies for the office.
- Address and resolve outstanding conditions from underwriters and screeners as required.
- Provide detailed explanations of different insurance policies and products to both potential and current clients, helping them make informed decisions.
- Generate quotes, maintain accurate client records, prepare necessary reports, and respond to inquiries regarding insurance plans and policies.

### Insurance Company

February 2015 - 2017

Licensed Producer & Customer Service Agent

- Enter data accurately and manage financial transactions including processing modifications and payments.
- Support clients with inquiries and ensure high-quality service.
- Organize and distribute incoming mail efficiently. and execute nightly financial deposits into multiple accounts.
- Handle and direct incoming electronic communications promptly.
- Resolve outstanding requirements from relevant parties as necessary.

### Insurance Company

February 2014 - June 2022

Receptionist & Producer

- Accurately input and manage data related to various operations.
- Deliver exceptional support and assistance to clients and handle financial tasks, ex. billing and processing updates.
- Efficiently sort and handle incoming correspondence and mail.
- Record and allocate incoming payments to multiple financial accounts.
- Conduct end-of-day financial transactions and deposits and maintain inventory by ordering essential office supplies.
- Efficiently manage and route incoming electronic communications.
- Address and resolve outstanding issues as required by relevant parties.

## CERTIFICATIONS

**P&C, Life & Health in the States of MS, SC, NM**

## ROLES, ACTIVITIES AND DESIRED COMPENSATION

Reported: 30-40 items/month, 25-35k premium./month

Remote only- any time zone \*\*NO NM AGENTS PLEASE

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

100+ outbound dials/day, 30+ inbound calls with live leads, referral sales, pivot and cross selling, bundling, win-backs, customer service and reports selling 4-5 raw new life policies/month.