

# Direct Hire Candidate: 4983 \*\*2-3 LIFE APPS/MONTH\*\*

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Licensed Insurance Agent

## EXPERIENCE

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### State Farm

April 2023 - Present

Licensed Insurance Agent

- Help clients find the right insurance protection by analyzing their needs and providing tailored recommendations.
- Licensed in Life Insurance and Property and Casualty, offering a wide range of insurance products to suit client requirements.
- Developed and maintained strong relationships with clients, achieving a high retention rate through exceptional service and personalized attention.
- Analyzed insurance policies and coverage options to ensure clients had appropriate levels of protection based on their individual needs.
- Educated clients on various insurance products, clearly explaining policy terms, conditions, and exclusions to help them make informed decisions.
- Processed policy changes, endorsements, cancellations, and renewals accurately, ensuring a seamless experience for clients.

### Life Insurance Company

August 2023 - August 2024

Specialist

- Assist clients in planning ahead to protect their loved ones from the financial burden of death, offering thoughtful advice and support.
- Engage in meaningful conversations with clients about their options, funeral preneed laws, and building lasting connections within the community.
- Provide ongoing support and guidance to existing customers, ensuring their pre-planning needs are met and up to date.
- Maintain accurate and up-to-date records of all client interactions using CRM software to ensure effective service and follow-up.
- Ensure compliance with relevant laws, regulations, and ethical standards in all aspects of pre-planning advisory services, safeguarding both clients and the company.
- Actively participate in professional development programs to stay informed on industry best practices and enhance expertise.

## EDUCATION

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### High School

Diploma

## CERTIFICATIONS

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P&C, Life Licensed in the States of AL, TN

## ROLES, ACTIVITIES AND DESIRED COMPENSATION

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Reported: 35-45 policies/\$25-35k premium/month

Will work REMOTE in any time zone

Desires a sales role with a State Farm Agency only @ \$37-40k+ base, with the ability to earn \$60k+ total

50+ outbound dials/day, 10+ inbound calls, pivot and cross selling, bundling, win-backs, referral selling, customer service & reports selling 2-3 new life policies/month.