

Direct Hire Candidate: 5041

Licensed Insurance Account Representative

Reported: 20-30 items per month / \$30-40k premium per month

Allstate 6 years

P&C Licensed in the State of TX

Will work REMOTE in any time zone

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

50+ outbound dials/day, 50+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, and customer service.

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EXPERIENCE

Farmers Insurance

October 2024 - Present

Licensed Insurance Account Representative

- Assist current customers with their insurance policies, ensuring they are up to date and meet their needs.
- Reach out to new leads, offering quotes tailored to their specific insurance requirements.
- Provide expert advice on coverage options and answer any questions to ensure customer satisfaction.
- Maintain strong relationships with clients, handling policy updates, renewals, and inquiries in a timely manner.
- Utilize insurance knowledge to offer the best solutions and improve customer retention.

Allstate

August 2024 - August 2024

Licensed Insurance Account Representative

Allstate

November 2018 - June 2024

Licensed Insurance Account Representative

- Delivered exceptional customer service, both through appointments and over the phone, ensuring client satisfaction.
- Supported the Senior Sales Manager by assisting with follow-ups, managing electronic files, and handling documentation.
- Provided assistance with servicing insurance policies, addressing client inquiries and resolving any issues.
- Collaborated effectively with other Account Representatives and Sales Agents, fostering a positive and cooperative team environment.
- Executed tasks efficiently while adhering to established procedures to maintain agency compliance.

Insurance Company

November 2016 - November 2018

Licensed Insurance Agent / CSR

- Manage and grow business related to Crop Insurance clients, ensuring client satisfaction and retention.
- Provide support in maintaining federal crop insurance policies while delivering excellent customer service.
- Collaborate with government agencies to assist clients in understanding and complying with regulations.
- Help customers complete necessary paperwork to insure their crops and assist with filing claims efficiently and promptly when needed.

Building Supply Company

February 2013 - September 2016

Shipping Lead

- Assign tasks and responsibilities based on the skills and strengths of each team member to optimize productivity.
- Oversee and coordinate all shipments to ensure timely and complete delivery.
- Train, supervise, and assess the performance of all personnel within the designated area.

EDUCATION

High School

Diploma

CERTIFICATIONS

Licensed Insurance Account Representative

P&C Licensed in the State of TX

SKILLS

Accounts Payable (10+ years), Accounts Receivable (8 years), Insurance Sales (5 years), Payroll (8 years), Sales Management (5 years), Account Management (10+ years), Office Management (10+ years), Pricing (6 years), Negotiation (5 years), Bookkeeping (10+ years), Management (10+ years), QuickBooks (10+ years), Sales (10+ years), Customer Service (10+ years), Account Analysis (5 years), Microsoft Outlook (10+ years), Cold Calling (2 years)