

Bilingual Spanish Hire: 5039 **1-2 LIFE APPS/MONTH**

Licensed Insurance Agent/Account Manager

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

State Farm 5 years

P&C, Life & Health Licensed in NM

Will work REMOTE in any time zone

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

50+ outbound dials/day, 10+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, customer service & reports selling 1-2 new life policies per month.

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EXPERIENCE

State Farm

January 2020 - March 2024

Licensed Insurance Agent/Account Manager

- Delivered prompt, accurate, and friendly customer service while addressing inquiries on insurance availability, eligibility, coverages, policy changes, transfers, claims, and billing clarifications.
- Ensured work was completed accurately and on time, maintaining high standards of quality.
- Demonstrated a strong work ethic and total commitment to success.
- Built and nurtured customer relationships, following up as needed to ensure satisfaction.
- Utilized a needs-based approach to educate clients about insurance options and assist in their decision-making.
- Focused on sales, cross-selling, and weekly marketing efforts to promote products and increase sales.
- Developed and implemented marketing strategies to build client base and promote products effectively.
- Sponsored and participated in community events to increase agency visibility and engage with potential clients.
- Mentored and trained new hires and existing team members to improve performance and achieve business goals.

Health Services

July 2018 - August 2019

Assistant to Director of Patient Safety

- Managed scheduling, including arranging meetings and updating calendars as needed.
- Coordinated logistics for weekly and annual events, handling room reservations and setups for various group sizes.
- Assembled informational packets, assisted with projects, and performed other duties as required.
- Conducted infection control audits, including hand hygiene observations of hospital staff on patient floors.

Insurance Services

July 2017 - July 2018

Claims Processing Clerk

- Process and enter first reports of injury with time sensitive information.
- Upload time sensitive legal documents and create folder for Corporate Governance.
- Send recorded statements to get transcribed then saved into injured workers folder for the adjuster.
- Scan legal documents and create task for Claims managers to review.
- Review all documents sent into claims general fax and upload into accurate file and tasked appropriately.
- Send letters to providers requesting proper billing forms or medical documentation of date of service.

Contractor

October 2016 - July 2017

Project Contract Administrator

- Managed all aspects of contracts, subcontracts, and purchase order preparation for federal aid and state projects.
- Assist project managers, engineers, and estimators in document prep for bidding, reconciliation, and state-mandated forms.
- Prepared Equal Employment Opportunity (EEO) documents for the company and subcontractors as required by NMDOT.
- Ensured that projects, employees, and documentation adhered to state and federal requirements.
- Prepared documents for materials certificates of compliance for materials used in projects as per state and federal aid contracts.

Insurance Services

August 2013 - January 2015

Commercial Lines CSR and Carrier Website Administrator

- Processed new business and renewals, Issued auto ID cards, certificates, evidence of property, and binders for clients.
- Managed cancellations, audits, and rate checks, including ordering worksheets and processing data.
- Acted as administrator for commercial line carrier websites, resolving login issues and addressing website-related inquiries for CSRs.
- Maintained contact with carriers via email and in-person meetings to stay updated on website changes and system updates.
- Assisted with Workers Comp policies.
- Retrieved claim information for Claims Advocates and representatives from carrier websites, providing updates as needed.

CERTIFICATIONS

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