

## Direct Hire Candidate: 5065

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Licensed Sales Producer

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

1 year Allstate, 1 year State Farm

P&C Licensed in FL

Will work REMOTE in EST

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

70+ outbound dials/day, 10+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling & customer service.

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Licensed Sales Producer

## EXPERIENCE

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### Allstate

February 2024 to Present

Licensed Sales Producer

- Proactively generates new business by making outbound calls and using effective closing techniques, consistently exceeding sales quotas by three times.
- Builds strong client relationships and expands portfolios by engaging with clients and establishing trust.
- Educates clients on a variety of insurance products, helping them find the best coverage options to meet their specific needs.
- Contributes to the growth of agency performance metrics by utilizing calling, networking, referrals, and other marketing strategies.

### State Farm

September 2023 - January 2024

Licensed Team Member

- Helped clients choose insurance policies that best suited their needs, providing expert guidance throughout the process.
- Explained a variety of insurance products to both potential and existing clients, guiding them to the most suitable options.
- Issued quotes, maintained accurate client records, and prepared detailed reports while promptly addressing client inquiries.
- Demonstrated excellent communication skills, both written and verbal, to effectively engage with clients.
- Fostered strong client relationships through consultations, ensuring their needs were met.

### Bank

October 2022 - February 2023

Licensed Relationship Banker

- Acquired Securities Industry Essentials (SIE) license to expand knowledge and expertise in the financial industry.
- Provided personal banking services, including the setup of new accounts and ongoing maintenance of existing customer accounts.
- Collaborated with business specialists to connect clients to investment and mortgage sales opportunities, helping close business deals.

### Bank

March 2022 - October 2022

Client Services Specialist

- Provided clients with educational guidance on account services, plan features, and functionalities to enhance their understanding.
- Assisted clients in navigating online account systems and explained how to access forms and statements.
- Collected and updated necessary client information and documentation in compliance with tax and regulatory requirements.
- Identified opportunities for reinvestment and referrals, connecting clients with Financial Advisors and Wealth Management services.

## EDUCATION

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### College

Bachelor's Degree

## CERTIFICATIONS

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### P&C Licensed in FL

## SKILLS

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Banking, Financial Services, Microsoft Office, Salesforce (4 years), Outbound Sales, Cross Selling, Outbound Calling, Communication Skills, Customer Service, Sales (10+ years), Relationship Management (8 years), Portfolio Management, Adobe Flash (3 years), Management, Upselling, CRM Software, Cold Calling, Insurance Sales, Presentation Skills, Retail Sales, Securities Law, Project Management, Microsoft Excel, Salesforce/ECRM, Prospecting