

# Bilingual Spanish Hire: 5159

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Licensed Insurance Specialist

## EXPERIENCE

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### Allstate

*June 2023 - October 2024*

Licensed Insurance Specialist

- Sold various types of insurance policies, including quoting, to meet client needs.
- Answered calls in a timely manner, addressing customer inquiries and providing excellent service.
- Entered payments accurately from clients to maintain up-to-date records.
- Responded to client emails promptly, providing information and assistance as needed.
- Informed clients about available insurance products, explaining coverage options and helping them make informed decisions.
- Followed workflow processes and implemented marketing techniques to attract new clients and grow the business.

### State Farm

*November 2022 - June 2023*

Licensed Insurance Receptionist

- Answered multi-line telephone, directed calls to the appropriate party or took messages as needed.
- Scheduled patient appointments and responded to emails in a timely manner.
- Collected payments from clients and entered payment details into the system.
- Contacted clients to remind them of upcoming cancellations and managed follow-ups.

### Medical Office

*January 2014 - November 2022*

Front Desk Receptionist

- Greeted clients upon arrival and directed them to the appropriate personnel.
- Collected personal and insurance information, ensuring accuracy and completeness.
- Took and relayed messages, efficiently routing calls to the correct individuals.
- Scheduled follow-up appointments and managed office calendars.
- Developed and maintained office forms, assisting with various administrative tasks.
- Handled client transactions, including cashing out clients and discussing treatment fees.
- Explained insurance copays and fees to patients, ensuring clear understanding.
- Entered insurance payments and sent out bills to patients in a timely manner.

## CERTIFICATIONS

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**P&C, Life & Health in the State of NY**

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Reported: 15-20 items/month, \$15-20k premium/month

Allstate 1 year

P&C, Life & Health NY

Will work REMOTE in EST

Desires a Sales or Hybrid role with an Allstate Agency @ \$40-45k base, with the ability to earn \$55k+ total

100+ outbound dials/day, 30+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling & customer service