

Bilingual Spanish Hire: 5157 \$3,500

Licensed Team Member

EXPERIENCE

State Farm

January 2016 - January 2025

Licensed Team Member

- Performed clerical tasks including filing, data entry, and document management.
- Handled money transactions accurately, ensuring proper documentation and record-keeping.
- Provided exceptional customer service, assisting both English-speaking and bilingual customers efficiently.
- Educated clients on policy details, claims processes, and important industry updates to keep them informed.
- Handled policy cancellations, reinstatements, and endorsements efficiently to ensure seamless service.
- Gathered and documented client information, including driving records, credit reports, and risk assessments, for accurate policy processing.
- Accurately completed and submitted insurance applications, ensuring timely and smooth policy processing.
- Maintained compliance with state insurance laws, carrier guidelines, and agency policies to ensure regulatory adherence.
- Stayed up to date with industry trends, underwriting requirements, and policy changes to provide current and accurate advice to clients.
- Guided clients through the claims process, acting as a liaison between them and the insurance company to ensure timely resolutions.

Department Store

March 2015 - January 2016

Sales

- Managed a team to initiate and launch a new program, ensuring successful execution and smooth operations.
- Handled money transactions and ensured accuracy in cash handling and financial processes.
- Provided exceptional customer service, addressing client needs, resolving issues, and maintaining high satisfaction levels.

Freeway Insurance

June 2011 - July 2015

Licensed Sales Manager

- Led a team to successfully achieve set goals through effective management and coordination.
- Organized and conducted meetings to ensure clear communication and progress towards objectives.
- Negotiated with customers to reach mutually beneficial agreements and enhance customer satisfaction.
- Handled financial transactions, including money management and processing deposits.

CERTIFICATIONS

P&C Licensed in the State of CA

SKILLS

Professional Skills: Administrative Operations, Sales, Deposit Accounts, Insurance Management and Aftercare, Customer Service, Telephone Skills, Technical Skills, Team Management IT Skills: Microsoft Office, Microsoft Excel

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

State Farm 9 years, Independent 4 years

P&C Licensed in CA

Will work REMOTE in any time zone

Desires a Hybrid, Sales, or Customer Service role with a State Farm Agency @ \$43k+ base, with the ability to earn \$60k+ total

20+ outbound dials/day, 30+ inbound calls, pivot and cross selling, referral sales, creating their own leads, bundling, retention, and customer service.