

# Direct Hire Candidate: 5145 \*\*2-4 LIFE APPS/MONTH\*\*

Licensed Account Manager

## EXPERIENCE

### Allstate

May 2024 - September 2024

Licensed Insurance Producer MSA

- Developed and managed a portfolio of clients, providing tailored insurance solutions to meet their unique needs.
- Analyzed client needs and recommended appropriate coverage options to ensure comprehensive protection.
- Prospected and generated leads through referrals, networking events, and cold calling to expand client base.
- Built and maintained strong client relationships through exceptional customer service and prompt issue resolution.
- Conducted thorough risk assessments for potential policyholders to accurately determine their coverage requirements.
- Educated clients on the features, benefits, and exclusions of various insurance policies, helping them make informed decisions.
- Utilized CRM software to track client interactions, manage leads, and maintain accurate records of policies sold.

### State Farm

November 2021 - May 2024

Licensed Account Manager

- Identified prospective clients through various lead generation methods, including referrals.
- Scheduled and conducted meetings with clients to assess their needs and provide tailored insurance solutions.
- Performed follow-up calls as needed to ensure client satisfaction and maintain relationships.
- Advised clients on appropriate insurance coverage based on their needs and risk profiles.
- Conducted periodic policy reviews to ensure that coverage remained up to date with the client's evolving needs.
- Prepared and presented detailed insurance proposals to clients, outlining suitable coverage options.
- Completed all necessary documentation and submitted it to underwriters for approval and processing.

### Independent Insurance

July 2014 to November 2021

Licensed Insurance Producer

- Evaluated customers' needs and financial status to propose tailored protection plans that align with their criteria, utilizing a range of carriers.
- Built and nurtured productive relationships with potential clients through networking, cold calling, and referrals, creating a strong pool of prospects.
- Collaborated with clients to deliver risk management strategies that were well-suited to their individual risk profiles.
- Continuously updated industry knowledge, staying informed about new products and services to better serve clients.
- Ensured all policy requirements were met, providing seamless service to clients throughout the process.

### State Farm

July 2012 - July 2014

Account Representative

- Assessed customers' financial services needs and prepared tailored proposals to sell services that best address these needs.
- Reached out to prospective customers to present information and explain available services, effectively communicating value.
- Prepared forms and agreements to finalize sales, ensuring accurate documentation.
- Developed prospects from existing commercial customers, referral leads, and sales or trade meetings.
- Performed administrative tasks, including maintaining accurate records and managing policy renewals.
- Monitored insurance claims to ensure fair settlement for both the client and the insurer, advocating for equitable resolutions.

## CERTIFICATIONS

P&C Licensed in the States of DE, PA, MD, WA, WV, VA | Life & Health Licensed in the States of DE, IN

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Licensed Account Manager

Reported: 35-45 policies/month, \$20-30k premium/month

State Farm 4.5 years, Independent 10 years, Allstate 6 months

P&C Licensed in DE, PA, MD, WA, WV, VA | Life & Health Licensed in DE, IN

Will work REMOTE in any time zone

Desires a Sales role with a State Farm Agency only @ \$37-40k+ base, with the ability to earn \$60k+ total

100+ outbound dials/day, 10+ inbound calls, pivot and cross selling, bundling, win-backs, referral selling, creating lead lists, networking, and customer service. The candidate reports selling 2-4 new life policies/month.