

# Direct Hire Candidate: 5201 \*\*3-5 Life apps per month\*\*

Licensed Sales Professional

## EXPERIENCE

### Local Allstate Agency

August 2023 - Present

Licensed Sales Professional

- Licensed General Lines Insurance Agent specializing in financial planning investments, property & casualty insurance, and policy account services management.
- Facilitate and assist with the claims process, ensuring timely and effective resolution.
- Provide expert guidance in managing and servicing client accounts, ensuring optimal coverage and client satisfaction.

### Local State Farm Agency

August 2022 - August 2023

Financial Executive

- Licensed General Lines Insurance Agent specializing in financial planning investments, property & casualty insurance, and policy account services management.
- Facilitate and assist with the claims process, ensuring timely and effective resolution.
- Provide expert guidance in managing and servicing client accounts, ensuring optimal coverage and client satisfaction.

### Local Insurance Agency

September 2021 - August 2022

Independent Insurance Broker

- Licensed Life Insurance Agent, specializing in final expense, mortgage protection, whole life, and term policies.
- Assess client needs to recommend the most suitable life insurance products.
- Provide personalized insurance solutions to ensure clients have the right coverage for their financial goals.

### SWBC PROFESSIONAL SERVICES, LLC, San Antonio, TX, US

May 2020 - September 2021

Family Service Sales Counselor

- Serve client families by making at-need and pre-need cemetery arrangements, providing exemplary personalized service.
- Respond to client inquiries with respect, sensitivity, and professionalism, building trust-based relationships for referrals.
- Understand each family's unique needs and offer solutions that provide value, focusing on final expense planning and protection.
- Collaborate with funeral directors and other staff members to deliver seamless, high-quality service, from at-need to aftercare.
- Oversee team quotas, commission and bonus pay, while recruiting, training, and mentoring new staff in accordance with company standards.

## EDUCATION

### University

Bachelor's Degree in Psychology

## SKILLS

Professional Skills: Insurance Management and Aftercare, Insurance Claim Processing, Sales, Insurance Sales, Financial Planning, Customer Service, Marketing, Profit-Based Sales Targets, Customer Account Management, Customer Relationship Management, Negotiation Skills, Sales Management, Brokerage, Billing Processes, Personal Injury Law, Health Insurance Portability and Accountability Act Compliance, Legal Knowledge.

## CERTIFICATIONS

### Property & Casualty and Life & Health Licensed

State of NC & TX

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Licensed Sales Professional

Direct Hire Candidate: 5201 \$3,500 3-5 LIFE APPS/MONTH

Reported: 25-35 items/month, \$25-35k premium/month

State Farm 1 year / Allstate 3 years

P&C & Life Licensed in TX & NC

Will work REMOTE in CST & EST

Desires a Sales or Hybrid role with a State Farm or Allstate Agency @ \$40-45k base, with the ability to earn \$80k+ total

100+ outbound dials/day, 10+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, customer service & reports selling 3-5 new life policies per month.