

# Direct Hire Candidate: 5224 \*\*5-7 Life apps/month\*\*

Licensed Sales Professional

## EXPERIENCE

### Local State Farm Agency

March 2020 - Present

Licensed Team Member

- Called potential customers to inquire about their current policies and expanded the customer base by offering relevant products.
- Analyzed customer policies, identified needs, and suggested changes or additions to improve coverage.
- Interviewed prospective clients to assess their financial resources and determine the coverage they required.
- Customized insurance programs to suit individual client needs, ensuring optimal protection.
- Maintained both electronic and paper records, managing policy renewals and updates efficiently.
- Assisted policyholders in settling claims, providing guidance and support throughout the process.

### Local Insurance Agency

February 2017 - February 2020

Personal Lines Sales Agent/ Office Manager

- Develop and manage customer relationships, acting as a primary resource for clients on all products and services.
- Achieve or exceed a monthly insurance sales quota of \$25,000, consistently driving revenue growth.
- Send premium payment reminders and notify clients of any rate changes to maintain clear communication.
- Solicit referral leads from satisfied customers, contributing to business growth through word-of-mouth marketing.
- Created and delivered a self-made coverage presentation that became the agency's standard for client education.
- Sell and complete applications for automobile, homeowners, and business policies, handling new business, renewals, and endorsements.

### Financial Company

May 2016 - November 2017

Account Executive

- Maintained in-depth knowledge of financing products and the alternative lending industry to effectively build rapport with small business owners seeking funds.
- Prepared action plans and schedules to identify target markets and project the number of contracts to be created.
- Utilized Customer Relationship Management (CRM) program to create and track prospect profiles and manage sales efforts.
- Responded promptly to client inquiries, resolving issues efficiently and professionally throughout the financing application and approval cycle.

## EDUCATION

### High School

Diploma

## SKILLS

- Professional Skills: Sales, Knowledge of Finance, Insurance Claim Processing, Interviewing, Electronics, Customer Service, Occupational Safety and Health, Recreational Activities, Forklift Trucks, Teaching, Insurance Sales, Business Development, Business Strategies, Customer Relationship Management, Presentations, Maintenance, Preventive Maintenance, Expediting, Knowledge of Packaging and Processing, Order Picking, Time Management, Contract Management, Scheduling, Target Market Selection, Insurance Management and Aftercare, ACCEL/Exchange, Agriculture IT Skills: Microsoft Office

## CERTIFICATIONS

### Property & Casualty Licensed

State of NY, ID, NJ, PA, GA, CO, CT, MI & AL

### Life and Health Licensed

State of NY, CT, NJ & PA

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Licensed Sales Professional

Direct Hire Candidate: 5224 \$3,500\*\* 5-7 LIFE APPS/MONTH\*\*

Reported: 60-70 policies/month, \$55-65k premium/month

Experience: State Farm 4.5 years, Farmer's 3 years, Allstate 4 months

P&C Licensed in NY, ID, NJ, PA, GA, CO, CT, MI, AL

Life & Health Licensed in NY, CT, NJ, PA

Will work REMOTE in any time zone

Desires a Sales 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 with live lead transfers, referral sales, networking, pivot and cross selling, bundling, customer service & reports selling 5-7 new life policies per month