

Direct Hire Candidate 5236: **3-5 life apps/month**

Licensed Team Member

Motivated, customer-focused professional seeking a role in the insurance industry. Skilled in sales, client relations, and policy management, with a strong ability to assess risk, provide tailored solutions, and ensure regulatory compliance. Eager to contribute and grow within a dynamic team.

EXPERIENCE

Local State Farm Agency

February 2024 - Present

Licensed Team Member

- Identify customer needs and provide tailored insurance solutions, including auto, home, life, and business coverage.
- Build strong client relationships by providing exceptional customer service and support throughout the sales and claims process.
- Explain complex insurance products and policy details clearly, ensuring clients understand their coverage options.
- Ensure compliance with industry regulations, adhering to state and federal laws to protect both clients and the company.
- Proactively seek new business opportunities through outbound calls, networking, and referrals, driving sales growth and expanding the client base.

Life Insurance Company

June 2021 - February 2024

Life Insurance Broker

- Assess clients' financial needs and recommend the most suitable life insurance policies to align with their goals and priorities.
- Collaborate with multiple insurance providers to ensure clients receive the best coverage options available.
- Educate clients on the benefits, coverage options, and premiums of various life insurance policies, helping them make informed decisions.
- Explain policy terms clearly, ensuring clients understand their coverage and the financial protection offered.
- Provide ongoing support to clients, answering questions and addressing any concerns regarding their life insurance policies.

Health Company

February 2020 - June 2021

Customer Account Representative

- Process patient payments, set up payment plans, and resolve billing discrepancies to ensure smooth transactions.
- Maintain accurate patient records, ensuring confidentiality and compliance with HIPAA regulations.
- Provide exceptional customer service by addressing patient concerns promptly and professionally.

EDUCATION

High School

Diploma

SKILLS

- Professional Skills: Customer Service, Customer Demand Planning, Regulatory Compliance, Insurance Sales, Insurance Management and Aftercare, Knowledge of Finance, Customer Relationship Management, Health Insurance Portability and Accountability Act Compliance, Billing Processes, Confidentiality, Sales, Infusions, Policy Analysis, Anti Money Laundering, Risk Analysis, Insurance Claim Processing, Negotiation Skills, Policy Governance, Agriculture IT Skills: Software Systems, Salesforce.Com

CERTIFICATIONS

Property & Casualty and Life & Health Licensed

State of TX

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Licensed Team Member

Direct Hire Candidate: 5236 \$3,500 **3-5 LIFE APPS/MONTH**

Reported: 20-30 items/month, \$20-30k premium/month

State Farm 1 year

P&C, Life & Health Licensed in TX

Will work REMOTE in CST

Desires a Sales role with a State Farm Agency @ \$40-45k base, with the ability to earn \$65k+ total

70+ 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