

# Direct Hire Candidate: 5235 \*\*2-3 Life apps/month\*\*

Licensed Team Member

*Hard-working professional known for staying on top of workloads and ensuring client satisfaction. Skilled in mathematics, social interaction, and various software applications, and eager to take on new challenges in a dynamic workplace.*

## EXPERIENCE

### Local State Farm Agency

*October 2023 - February 2025*

Licensed Team Member

### Local State Farm Agency

*October 2020-October 2023*

Licensed Team Member

- Meet with clients daily to assess their needs and match them with appropriate products.
- Create projections for clients, providing clear and tailored recommendations based on their goals.
- Guide clients through the decision-making process, ensuring they fully understand their options.
- Assist in delegating office functions to ensure smooth and efficient operations.
- Help manage office activities, supporting administrative tasks to maintain organizational efficiency.

### Bank

*September 2019 - November 2020*

Financial Representative

- Assisting clients in creating comprehensive financial plans tailored to their business, retirement, and personal goals.
- Specialized in Life and Disability insurance, providing expert advice and coverage solutions to meet client needs.

### Local Allstate Agency

*March 2017 - October 2019*

Licensed Sales Profesional

- Quoted and bound various types of insurance, ensuring accurate coverage recommendations based on client needs.
- Processed claims promptly, coordinating with clients, underwriters, and adjusters to ensure timely resolution and client satisfaction.
- Advised clients on insurance options, explaining coverage details, policy terms, and providing tailored solutions to meet their specific needs.

## EDUCATION

### University

Bachelor's in Economics

## SKILLS

- Professional Skills: Sales, Mentoring, Task Management, Economy, Consulting, Insurance Claim Processing, Insurance Sales, Financial Planning, Knowledge of Finance, Budgeting Skills, Scheduling, Business Intelligence, Financial Underwriting, Insurance Management and Aftercare, Accounting, Accounting Software, Financial Analysis, Financial Management, Forecasting Skills, Writing of Reports, Asset Management, Banking Services, Financial Industry Regulatory Authorities, Business Development, Customer Account Management, Presentations, Knowledge of Mathematics, Data Collection, Certified Social Sourcing Recruiter (CSSR), Payroll Management, Agriculture IT Skills: Power BI, Pivot Tables, Microsoft Office, Salesforce.Com, Software Applications

## CERTIFICATIONS

### Property & Casualty and Life & Health Licensed

State of CO, FL & GA

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Licensed Team Member

Direct Hire Candidate: 5235 \$3,500 \*\*2-3 LIFE APPS/MONTH\*\*

Reported: 30-40 policies/month, \$40-50k premium/month

State Farm 4.2 years, Independent 1 year, Allstate 2.5 years

P&C, Life & Health Licensed in CO, FL & GA

Will work REMOTE in any time zone

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

50+ outbound dials/day, 15+ inbound calls with live leads, pivot and cross selling, referral sales, creating their own leads, bundling, assistant office manager & customer service