

Direct Hire Candidate: 5261 **3-5 Life apps per month**

Licensed Team Member

Seasoned service professional with 17+ years of experience in financial sales, leadership, and management. Highly motivated and seeking a full-time sales representative position to drive results and contribute to team success.

EXPERIENCE

Local State Farm Agency

June 2023 - November 2024

Licensed Team Member

- Developed leads, scheduled appointments, identified customer needs, and marketed appropriate products and services to clients.
- Built and maintained strong customer relationships, following up to ensure satisfaction and address ongoing needs.
- Provided prompt, accurate, and friendly customer service, handling inquiries related to insurance availability, eligibility, coverage, policy changes, transfers, claims, and billing.
- Collaborated with the agent to establish and achieve marketing goals, driving business growth and client engagement.
- Used a customer-focused, needs-based review process to educate clients on their insurance options and ensure they were well-informed.
- Demonstrated a strong work ethic, maintaining a total commitment to achieving success every day.

Mortgage Company

September 2020 - August 2022

Loan Officer/Loan Officer Assistant

- Managed a large pipeline of leads and prospective clients through the full sales cycle, scheduling appointments and providing administrative support as needed.
- Acted as the primary contact and liaison between clients, branch manager, and loan originator, coordinating meetings and follow-ups.
- Originated Reverse & Forward FHA, Conventional, Jumbo, and VA loans, providing tailored home equity solutions for seniors.
- Prepared and coordinated documentation for verifications and underwriting, including loan files, credit reports, and mortgage application paperwork.

Mortgage Company

June 2018 - June 2019

Senior Loan Officer

- Originated Reverse & Forward FHA, Conventional, Jumbo, and VA loans, offering diverse options to meet client needs.
- Provided tailored home equity solutions for seniors, ensuring the best financial outcomes for each client.
- Analyzed and evaluated various loan options to ensure they aligned with clients' financial goals and requirements.
- Managed a high volume of inbound and outbound calls, efficiently addressing client inquiries and processing loan applications.
- Oversaw a large pipeline of leads and prospective clients, guiding them through the entire sales cycle from initial contact to loan approval.

EDUCATION

High School

Diploma

SKILLS

Professional Skills: Customer Service, Customer Relationship Management, Mortgage Insurance, Sales, Sales Processes, Financial Underwriting, Credit Reports, Loans, Consultative Selling, Cold Calling Sales, Negotiation Skills, Strategies of Pricing, Insurance Management and Aftercare, Financial Analysis, Accounts Receivable, Customer Support, Time Management, Business Development, Customer Account Management, Sales Management, Team Management.

CERTIFICATIONS

Property & Casualty and Life & Health Licensed

State of CO

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Licensed Team Member

Direct Hire Candidate: 5261 \$3,500 **3-5 LIFE APPS/MONTH**

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

State Farm 1.8 years

P&C, Life & Health Licensed in CO

Will work REMOTE in any time zone

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

100+ outbound dials/day, 10+ inbound calls with live leads, pivot and cross selling, referral sales, creating their own leads, bundling, training new employees & customer service. Reports averaging 3-5 new life policies/month.