

# Direct Hire Candidate: 5275

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Licensed Sales Professional

## EXPERIENCE

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### Local Allstate Agency

August 2023-April 2025

Licensed Sales Professional

### Local State Farm Agency

April 2023-July 2023

Licensed Team Member

- Assessed clients' insurance needs and provided tailored Property & Casualty coverage options, including auto, home, and commercial policies.
- Prospected new clients through networking, cold calling, and referrals, expanding the client base and driving revenue growth.
- Educated clients on policy features, exclusions, deductibles, and premiums to ensure they understood their coverage options.
- Cross-sold additional insurance products, such as umbrella policies and renters' insurance, to enhance coverage and increase premiums.
- Maintained strong relationships with clients by providing excellent customer service and addressing policy changes or claims promptly.
- Met or exceeded sales goals consistently, maintaining a focus on customer satisfaction and long-term client retention.

### Retirement Company

February 2023-present

Retirement Consultant

- Provide comprehensive retirement planning advice, including investment strategies, asset allocation, and income planning tailored to clients' needs and goals.
- Assist clients in understanding retirement products such as 401(k)s, IRAs, annuities, and other pension options, ensuring they make informed decisions.
- Evaluate clients' financial situations to create personalized retirement plans that align with their future financial goals and risk tolerance.
- Build and maintain strong relationships with clients, offering ongoing support and guidance to adapt their retirement plans as circumstances change.
- Stay current on retirement trends, tax laws, and financial products to offer clients up-to-date, relevant information and recommendations.
- Conduct educational seminars and workshops to inform clients and prospects about retirement planning and the benefits of early preparation.

## SKILLS

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- Professional Skills: Assisting Teachers, Occupational Therapy, Psychology, People Services, Knowledge of Finance, Social Work, Treatment Plans, Medical Materials, Journals, Planning of Lessons, Teaching, Prioritization of Requirements, Presentations, Knowledge of Hygiene, Stock Control, Electronics, First Aid and Preparedness, Neurology, Physical Therapy, Performing Arts, Nursing, Physiology, Singing, Public Services, Records Management

## CERTIFICATIONS

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### Property & Casualty Licensed

State of CA, NV & UT

### Life and Health Licensed

State of UT

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Reported: 20–30 items/month / \$20–30k premium/month

Allstate 2 years, State Farm 6 months

Licensed in P&C CA, NV, UT | Life licensed in UT only

Will work REMOTE ONLY in PST, MST & CST

Desires a Remote role with an Allstate Agency @ \$40–45k base with the ability to earn \$85k+ total

(Would consider a lower base with a higher commission structure)

Background includes 100+ outbound dials/day, 10+ inbound calls, referral sales, pivot and cross selling, lead generation, bundling, and customer service