

Direct Hire Candidate: 5308

Licensed Sales Professional

Enthusiastic and dedicated professional seeking to contribute strong sales and customer service skills, along with a proven work ethic and sense of responsibility. Capable of working in fast-paced environments with the physical ability to move, lift, and adapt as needed.

EXPERIENCE

Local Allstate Agency

2023 - Present

Licensed Sales Professional

- Made high-volume outbound sales calls while efficiently handling inbound insurance inquiries
- Marketed insurance products outside the office by setting up displays, engaging with potential clients face-to-face, and promoting home and auto policies
- Assisted in training and onboarding new employees, ensuring they were well-prepared for success in sales and customer service roles

Bank

2018 - 2022

Home Lending Advisor

- Handled high-volume inbound and outbound calls for mortgage refinancing inquiries, ensuring compliance with bank policies and Fair Lending regulations
- Matched clients with appropriate refinance programs by identifying financial needs and collecting required documentation to initiate loan applications
- Managed an average pipeline of 100 loans monthly, including fee collection, document gathering, and escalation to ensure timely closings
- Maintained ongoing communication with processing and underwriting teams to support efficient loan completion and customer follow-ups

Bank

2013 - 2018

Home Preservation Specialist

- Handled high-volume inbound calls, providing excellent customer service and resolving inquiries efficiently
- Managed escalated customer concerns with professionalism, ensuring resolution and satisfaction
- Communicated with underwriting teams to make informed credit decisions in line with bank policies and regulations
- Reviewed delinquent mortgage accounts to assess risk and offer retention solutions to preserve loans
- Managed a pipeline of 100+ loan applications while acquiring new ones through proactive customer engagement
- Evaluated income and financial documents to determine eligibility for mortgage preservation programs per federal and company guidelines
- Utilized multiple systems and platforms to deliver seamless support and accurate information during customer interactions

SKILLS

- Professional Skills: Financial Underwriting, Sales, Employee Onboarding, Marketing, Loans, Refinancing, Financial Regulations, Knowledge of Finance, Insurance Claim Processing, Profit-Based Sales Targets, Mentoring, Telephone Skills, Quality Management, Health Care, Mortgage Loans, Accounting, Regulatory Compliance, Risk Analysis, Customer Service, Absence Management
- IT Skills: Microsoft Excel, Microsoft Office, Microsoft PowerPoint, Microsoft Word, Microsoft Outlook

CERTIFICATIONS

Property & Casualty Licensed

State of AZ & CA

Direct Hire Candidate: 5308

Licensed Sales Professional

Direct Hire Candidate: 5308 \$3,500

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

Allstate 1.5 years

P&C Licensed in AZ & CA

Will work REMOTE in any time zone

Desires a Sales role with an Allstate Agency @ \$40-45k base, with the ability to earn \$70k+ total

80+ outbound dials/day, inbound calls with live leads, referral sales, pivot and cross selling, bundling, and customer service