

Direct Hire: 5370 **3-5 LIFE APPS/MONTH**

Licensed Insurance Producer

EXPERIENCE

State Farm

2022 - (June) 2025

Office Manager

- Consistently achieved and exceeded monthly and quarterly sales targets across multiple lines of insurance
- Managed client accounts to ensure comprehensive coverage, proactively identifying gaps and recommending appropriate products
- Assessed individual insurance needs and presented tailored solutions, including Auto, Home, Renters, and Life Insurance
- Processed insurance applications accurately and efficiently while ensuring compliance with underwriting guidelines
- Responded to client inquiries, policy changes, billing issues, and claims with professionalism and urgency
- Utilized Salesforce to maintain and organize client data, track interactions, and follow up on leads and renewals
- Secured payments, processed checks, and managed cash transactions with a high degree of fiduciary responsibility
- Maintained regular communication with clients through calls, emails, and texts to ensure satisfaction and retention
- Handled sensitive customer data with discretion, maintaining confidentiality and adhering to compliance standards
- Resolved client concerns with empathy and efficiency, reinforcing trust and strengthening long-term relationships

Life Insurance Company

2020 - 2022

Licensed Insurance Producer

- Presented and educated clients on a wide range of products, including Life Insurance, Medicare Advantage and Supplement Plans, Critical Illness, Short-Term and Long-Term Care Insurance, and Annuities
- Prospected and acquired new clients through cold calling, lead follow-ups, door-to-door outreach, mailer campaigns, and personal referrals
- Conducted in-depth client interviews to uncover core needs, values, and long-term goals, delivering personalized and effective insurance solutions
- Cross-sold and upsold multiple product lines by identifying coverage gaps and reinforcing the value of comprehensive protection
- Addressed client objections and concerns with clarity and professionalism, highlighting key benefits and differentiators of available plans
- Delivered presentations on effective sales strategies to peers and team members, contributing to overall agency growth and performance

Life Insurance Company

2022 - 2022

Licensed Insurance Producer

- Presented and educated clients on Life Insurance and Mortgage Protection products, emphasizing financial security and long-term planning
- Conducted in-person appointments by scheduling, traveling to client homes, and building rapport through face-to-face interactions
- Assessed individual client needs to recommend tailored financial protection solutions aligned with their goals and circumstances
- Managed the full application process, including accurate completion of online applications and conducting basic field underwriting
- Executed personal marketing strategies—including outreach campaigns and referrals—to generate leads and build a steady pipeline of prospective clients

EDUCATION

University

Bachelor of Science (Business)

CERTIFICATIONS

P&C, Life&Health Licensed in PA, OH, VA, & MD

Direct Hire: 5370 **3-5 LIFE APPS/MONTH**

Licensed Insurance Producer

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

State Farm 2 years, Independent 2 years (Life & Health)

P&C, Life & Health Licensed in PA, OH, VA, & MD

Will work REMOTE ONLY in EST

Desires a Sales role with any agency @ \$40-45k base with \$70k+ earning potential

80+ outbound dials/day, inbound calls, win-backs, cross selling, pivot selling, marketing, bundling, referral selling, creating own leads, office management, customer service & reports selling 3-5 life policies per month.