

Bilingual Spanish Hire: 5407

Licensed Insurance Producer

EXPERIENCE

Insurance Company

January 2024 - May 2025

Licensed Insurance Producer

- Developed and maintained a strong client base through proactive prospecting, networking, and referrals
- Analyzed clients' financial situations to recommend life insurance coverage tailored to their needs and long-term goals
- Presented and explained a range of insurance policies, clearly outlining features, benefits, and premium structures
- Delivered exceptional customer service by responding promptly to inquiries, resolving issues, and processing policy updates
- Built lasting client relationships through trust, education, and consistent follow-up

Allstate Insurance

November 2021 - November 2024

Licensed Insurance Producer/Customer Service Representative

- Made outbound calls and responded to inbound inquiries to generate leads and close home and auto insurance sales, primarily over the phone
- Scheduled and conducted sales appointments to present and sell policies to prospective clients
- Gained experience selling for multiple carriers
- Entered client information and call notes accurately into LightSpeed and eAgent systems for efficient record-keeping and follow-up
- Learned and completed Weekly Sales Reports (WSRs) to track progress, performance, and sales goals

Insurance Company

December 2019 - November 2021

Licensed Insurance Producer/Customer Service Representative

- Completed full phone-based insurance sales, from initial contact to policy binding
- Gathered and uploaded required documents accurately to ensure compliance and smooth processing
- Documented and organized claims, assigning uploaded photos to their appropriate sections for efficient review
- Performed general office duties, including managing inbound and outbound calls, handling emails, and maintaining client records
- Took regular inventory and ensured proper organization and availability of office supplies and materials

Insurance Company

February 2019 - July 2019

Customer Service Representative/Marketing

- Explained insurance coverages clearly to clients, helping them make informed decisions
- Made 40+ outbound sales calls daily to generate leads and close policies
- Prepared and submitted end-of-day reports to track sales performance and office activity
- Counted the register and completed daily bank deposits with accuracy and timeliness
- Documented and uploaded claims, assigning each image to the correct section for efficient processing

CERTIFICATIONS

Licensed in P&C – CA, NV | Life & Health – NV

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Licensed Insurance Producer

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

Experience: Allstate 3 years, Independent 3.5 years

Licensed in P&C – CA, NV | Life & Health – NV

Will work REMOTE in PST, MST, CST

Desires a Sales or Hybrid role with an Allstate Agency @ \$40–45k base, with \$60k+ earning potential

100+ outbound calls/day, 15+ inbound calls with live leads, pivot & cross selling, referrals, policy reviews, win-backs, & customer service.