

Direct Hire Candidate: 5489 ***1-2 LIFE APPS/MO***

Licensed Insurance Producer

EXPERIENCE

State Farm Insurance

June 2018 - Present

Multi-Line Account Representative

- Boosted customer satisfaction by promptly and professionally addressing inquiries and concerns.
- Increased client retention through consistent follow-ups and efficient resolution of issues.
- Managed multi-line insurance products, delivering tailored solutions based on client needs.
- Built strong client relationships, resulting in high loyalty and repeat business.
- Consistently exceeded sales targets by implementing effective cross-selling and upselling strategies.
- Collaborated with team members to achieve shared sales and service goals.
- Provided exceptional service to new and existing clients, leading to increased referrals.
- Trained and mentored new employees, sharing best practices for successful multi-line representation.
- Conducted detailed risk assessments to ensure accurate quoting and adequate coverage.
- Launched proactive outreach campaigns to key demographics, driving new business growth.
- Maximized revenue through strategic bundling and upselling based on client-specific needs.
- Stayed current on regulatory changes and industry best practices through ongoing professional development.
- Utilized CRM software to manage customer data, track interactions, and streamline internal communication.
- Advised clients on policy coverage and endorsements, helping them choose the most suitable options.
- Handled inbound customer calls, resolving issues and answering policy-related questions.
- Completed coverage applications and obtained underwriting approval as needed.
- Calculated premiums, established payment methods, and finalized sales transactions.
- Conducted comprehensive needs analysis to align coverage with clients' long-term financial goals.
- Performed annual policy reviews to ensure up-to-date coverage and identify cross-sell opportunities.

EDUCATION

Private University

Bachelor of Science (Accounting)

Community Collage

Associate of Science (Business Administration)

CERTIFICATIONS

Licensed P&C, Life & Health in: PA

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Licensed Insurance Producer

Reported: 35–45 policies/mo, \$30–40k premium/mo

Experience: State Farm 7 years

Licensed P&C, Life & Health in: PA

Will work REMOTE in any time zone

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

30+ outbound dials/day, 20+ inbound calls, referral sales, pivot & cross selling, bundling, lead generation, creating lead lists, networking, training employees, & excellent customer service. The candidate also reports 1–2 new life policies sold per month.