

Direct Hire Candidate: 5536

Licensed Insurance Producer

EXPERIENCE

State Farm Insurance

2024 - Present

Licensed Insurance Producer

- Conduct thorough needs assessments and risk evaluations to recommend appropriate insurance solutions.
- Educate clients on policy features, benefits, exclusions, and claims processes to ensure informed decision-making.
- Manage existing client accounts, including policy servicing, renewals, endorsements, and claims assistance.
- Consistently meet or exceed monthly/quarterly production goals and retention benchmarks.
- Cross-sell and upsell additional lines of coverage to maximize customer protection and agency revenue.
- Maintain compliance with state insurance laws, carrier underwriting guidelines, and agency procedures.
- Utilize CRM and AMS systems to track leads, document client interactions, and manage sales pipeline.
- Build long-term client relationships through trust, transparency, and exceptional customer service.

Call Center

2023 - 2024

Service Representative

- Handled a high volume of inbound calls for major financial institutions, ensuring prompt and accurate customer support.
- Assisted clients with account inquiries, transactions, and issue resolution, maintaining compliance with industry regulations.
- Delivered exceptional customer service by actively listening, identifying client needs, and providing effective solutions.
- Documented all interactions in company systems with a high level of accuracy and attention to detail.
- Met and exceeded call center KPIs, including response time, resolution rate, and customer satisfaction scores.
- Maintained professionalism while handling sensitive financial information in accordance with confidentiality and security standards.

Product Development LLC

2010 - 2023

Owner

- Developed multiple product prototypes by collaborating with engineers and testing clients, refining design and functionality through iterative feedback.
- Conducted marketability assessments to ensure alignment of product features with consumer demand.
- Created and presented a comprehensive business plan to demonstrate practical understanding of market positioning and financial viability.
- Partnered with cross-functional teams to translate client insights into product improvements and new design opportunities.
- Applied strong problem-solving and analytical skills to balance innovation, usability, and cost-effectiveness in product development.

EDUCATION

Private University

Bachelor Degree

CERTIFICATIONS

Licensed P&C (20-44) in: FL

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Reported: 30–40 policies/mo, \$40–50k premium/mo

Experience: State Farm 1 year

Licensed P&C (20-44) in: FL

Will work REMOTE in EST, CST, or local to 33301 (Ft. Lauderdale, FL)

Desires a Sales role with a State Farm or Allstate Agency @ \$35–40k+ base, with \$60k+ earning potential

70+ outbound dials/day, 5+ inbound calls, pivot & cross selling, referral sales, bundling, developing their own leads, networking, & customer service.