

Direct Hire Candidate: 5547

Licensed Insurance Producer

EXPERIENCE

Insurance Company

December 2021 - July 2023

Licensed Insurance Producer

- Built strong relationships with families by providing personalized financial protection plans.
- Educated clients on policy features, benefits, and riders to ensure informed decision-making.
- Managed a book of business through policy reviews, renewals, and beneficiary updates.
- Provided claims support by assisting families with the filing process and explaining policy benefits.
- Prospected new business through referrals, community outreach, and door-to-door lead generation.
- Maintained accurate records of client interactions, applications, and policy updates in CRM systems.
- Ensured compliance with state regulations and company standards in all sales and service activities.
- Delivered compassionate customer service by treating clients like family and ensuring long-term trust.

Allstate Insurance

March 1983 - July 2011

Agency Owner

- Owned and operated an Allstate Insurance Agency, overseeing P&L management, staffing, and compliance with corporate and state regulations.
- Recruited, hired, and trained licensed producers, implementing coaching programs that increased sales productivity and retention.
- Developed and executed strategic marketing campaigns including digital, community outreach, and referral programs to drive agency growth.
- Managed a diverse book of business, providing ongoing client service, account reviews, and claims assistance to ensure customer satisfaction and retention.
- Leveraged cross-selling and upselling techniques to maximize multi-line policies and expand revenue streams.
- Built and maintained strong client relationships, resulting in high renewal and referral rates.
- Implemented sales tracking systems and KPIs to monitor team performance and align with corporate benchmarks.
- Ensured compliance with insurance regulations, underwriting guidelines, and Allstate corporate policies.
- Oversaw community involvement initiatives, positioning the agency as a trusted local resource for insurance and financial protection.
- Conducted regular financial analysis, budgeting, and forecasting to optimize profitability.
- Negotiated vendor relationships and controlled expenses to maximize operational efficiency.

EDUCATION

Public University

Bachelor Degree

CERTIFICATIONS

Licensed P&C in: LA

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Reported: 30 policies/mo, \$30k premium/mo

Experience: Allstate 28 years

Licensed P&C in: LA

Will work HYBRID

Desires a Hybrid role with an Agency @ \$45k base, with \$100k earning potential

30 outbound dials/day, 30 inbound calls, referral sales, pivot & cross selling, & delivering excellent customer service.