

Direct Hire Candidate: 5557

Licensed Insurance Producer

EXPERIENCE

Insurance Company

October 2024 - Present

Agent Advisor

- Enrolled clients into affordable health insurance plans via the Marketplace, ensuring coverage aligned with individual needs and budgets.
- Upsold and cross-sold supplemental products, including Dental, Vision, Accident, Critical Illness, Hospital Indemnity, and Life insurance.
- Appointed with and knowledgeable across multiple insurance carriers, offering a wide range of plan options to meet client needs.
- Educated clients on policy features, benefits, and exclusions to help them make informed decisions.
- Maintained compliance with federal Marketplace regulations and carrier guidelines.
- Built strong client relationships through consistent follow-up, ongoing service, and policy reviews.
- Exceeded monthly enrollment and sales targets by leveraging product knowledge and consultative selling strategies.

Insurance Company

April 2023 - October 2024

Agent Advisor

- Sold auto insurance policies to customers transferred directly from dealerships nationwide.
- Conducted proactive follow-up calls to round and upsell additional coverage, including homeowners, umbrella, and recreational "toys" (boats, motorcycles, etc.).
- Recognized with top achievement award within the first 2.5 weeks on the sales floor, demonstrating strong closing ability and upselling skills.
- Delivered clear policy explanations to ensure customers understood coverage terms, limits, and benefits.
- Built long-term client relationships by providing personalized insurance solutions and superior service after initial binding.
- Exceeded sales goals by leveraging dealership partnerships and consistent upselling strategies.
- Adapted quickly to a high-volume sales environment, maintaining compliance with state and company regulations.

Farmers Insurance

April 2020 - February 2023

Agency Owner

- Managed all aspects of agency operations, including HR, marketing, customer service, and policy servicing.
- Prospected and solicited clients through phone, email, and marketing campaigns to grow book of business.
- Successfully upsold and cross-sold auto, home, umbrella, business, and life insurance, achieving multi-policy sales 90% of the time.
- Provided exceptional customer service by maintaining relationships, addressing inquiries, and processing policy changes and renewals.
- Recognized for hitting the quarterly max, demonstrating top-tier performance and sales execution.
- Built strong client rapport by tailoring policies to customer needs, increasing retention and referrals.
- Balanced multiple responsibilities, consistently delivering results in a fast-paced, high-volume environment.

Insurance Company

June 2019 - April 2020

Insurance Agent

- Handled inbound calls to sell Auto Insurance, SR-22 filings, and Life Insurance quotes to consumers nationwide.
- Achieved \$23K+ in written premiums during first week, exceeding onboarding expectations.
- Averaged \$100K in premiums monthly, consistently ranking as a top producer.
- Met and exceeded multiple performance metrics including conversion rate, compliance, and call handling efficiency.
- Delivered excellent customer service while cross-selling and upselling policies to increase household penetration.
- Maintained accurate documentation of client information, policy details, and sales activities in CRM systems.

CERTIFICATIONS

Licensed P&C in: AK, CO, FL, KS, LA, OH, PA, NC, MI, MO, MN, TN, TX, OK, VA

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Licensed Insurance Producer

Reported: 50–60 policies/mo, \$60k premium/mo

Experience: Allstate 1 year

Licensed P&C in: AK, CO, FL, KS, LA, OH, PA, NC, MI, MO, MN, TN, TX, OK, VA

Will work REMOTE in any time zone

Desires a Sales role with any Agency @ \$40k base, with \$80–90k earning potential

80+ outbound dials/day, 15 inbound calls, pivot & cross selling, cold calling, lead generation, & customer service. With licenses across 15 states & a strong outbound focus, they are motivated and eager to grow.