

# Direct Hire Candidate: 5534 \*\*\*1-2 LIFE APPS/MO\*\*\*

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Licensed Insurance Producer

## EXPERIENCE

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### Allstate Insurance

December 2022 - Present

Licensed Insurance Producer

- Specialized in Property & Casualty Insurance sales, providing tailored coverage solutions.
- Delivered exceptional customer service by addressing inquiries, resolving policy issues, and building long-term client relationships.
- Supported the sales process through prospecting, quoting, and follow-up communication.
- Successfully expanded sales portfolio to include Home, Auto, Life, and Property insurance policies.
- Consistently contributed to agency growth by upselling and cross-selling policies based on client needs.

### Family Law Attorney

March 2021 - December 2022

Client Development Manager

- Coordinated and managed intake team operations, ensuring efficiency and consistency in handling new client inquiries.
- Sourced and qualified leads, generating a strong sales pipeline for potential new clients.
- Performed case reviews to confirm eligibility and secure prospects as qualified clients.
- Trained and mentored new team members on the intake sales process, improving onboarding efficiency and team performance.
- Applied a consultative sales approach to build trust with potential clients, assess needs, and provide tailored solutions.
- Improved client portfolio by 20% through account management, client retention initiatives, and problem resolution.
- Strengthened client relationships, fostering retention and account growth.
- Demonstrated adaptability in a fast-changing work environment, leveraging technology to streamline intake processes.

### Financial Planning Firm

May 2020 - March 2022

Business Development Representative

- Partnered with financial planners to grow books of business by driving lead generation through multiple sources.
- Generated 100+ outbound calls daily while balancing inbound requests to acquire qualified leads.
- Scheduled one-on-one consultations for prospects with \$100K+ investable assets, ensuring high-value client engagement.
- Demonstrated grit, motivation, and excellent communication skills while consistently achieving lead conversion targets.
- Maintained detailed records in CRM systems, logging calls, emails, and follow-up tasks according to compliance guidelines.
- Coordinated with financial planners and prospects to streamline the sales process and keep opportunities moving forward.
- Responded promptly to prospective client inquiries via phone and email, ensuring a professional and engaging client experience.

## EDUCATION

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### Public Collage

Associate Degree

## CERTIFICATIONS

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Licensed P&C, Life in: CA

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Licensed Insurance Producer

Reported: 20–30 policies/mo, \$20–30k premium/mo (excludes homeowners due to CA sales restrictions)

Experience: Allstate 2.6 years

Licensed P&C, Life in: CA

Will work REMOTE in any time zone

Desires a Sales or Hybrid role with an Allstate Agency @ \$40–45k base, with \$70k+ earning potential

50+ outbound calls/day, 15+ inbound calls with live leads, pivot & cross selling, developing their own leads, referral sales, networking, win-backs, & customer service. They also have life sales experience, averaging 1–2 new life policies per month.