

# Direct Hire Candidate: 5529

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Licensed Insurance Producer

## EXPERIENCE

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### State Farm Insurance

March 2024 - Present

#### Account Representative

- Established and maintained strong customer relationships through consistent communication and follow-up.
- Utilized a customer-focused, needs-based review process to educate clients on insurance options and coverage.
- Generated and developed leads through prospecting, referrals, and outbound calls.
- Scheduled appointments, identified client needs, and recommended appropriate insurance products and services.
- Marketed tailored insurance solutions, improving client satisfaction and retention.

### Credit Union

June 2023 - Present

#### Relationship Specialist

- Performed day-to-day banking procedures, including opening new accounts and maintaining existing ones.
- Processed loan and credit card applications with accuracy and compliance to financial regulations.
- Handled teller transactions such as deposits, withdrawals, transfers, and check cashing.
- Delivered exceptional customer service by assisting clients with account inquiries and financial needs.
- Ensured accuracy and confidentiality in all financial transactions and documentation.

### Law Firm

September 2022 - Present

#### Legal Assistant

- Guided debtors through the bankruptcy process from initial consultation to case resolution, ensuring compliance with all legal requirements.
- Collected, reviewed, and organized full financial records from clients to prepare accurate filings.
- Answered incoming calls, assisted clients with inquiries, and processed payments promptly.
- Filed legal documents with precision, maintaining accuracy and adherence to court deadlines.
- Operated independently in a single-office environment, demonstrating strong self-management and organizational skills.

### Insurance Agency

April 2018 - September 2022

#### Licensed Insurance Producer

- Obtained Property & Casualty license, demonstrating strong knowledge of insurance products and regulations.
- Delivered customer-focused service by managing inbound calls and assisting walk-in clients with policy needs.
- Wrote new insurance policies and processed policy changes with accuracy and attention to detail.
- Handled all claim activity from initiation to resolution, ensuring timely follow-up and client satisfaction.
- Earned Commercial Lines Coverage Specialist (CLCS) designation from The Hartford School of Insurance, strengthening expertise in commercial insurance.

## EDUCATION

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### Private University

Associate Degree

## CERTIFICATIONS

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Licensed P&C, Life & Health in: GA

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Licensed Insurance Producer

Reported: 30–40 policies/mo, \$20–30k premium/mo

Experience: State Farm 1.5 years, Independent 4 years

Licensed P&C, Life & Health in: GA

Will work REMOTE in EST only

Desires a Sales or Hybrid role with a State Farm Agency @ \$43–45k base, with \$55k earning potential

25+ outbound dials/day, 15+ inbound calls, referral sales, pivot & cross selling, bundling, office management, & customer service.