

Bilingual Spanish Hire: 5525

Licensed Insurance Producer

EXPERIENCE

Allstate Insurance

November 2024 - Present

Licensed Insurance Producer

- Possess active P&C, Life & Health insurance licenses
- Explain various insurance policies and products to potential and existing clients, guiding them toward the most appropriate coverage
- Issue quotes, maintain client records, prepare reports, and address client inquiries regarding insurance plans and policies
- Provided clients with expert guidance in selecting insurance policies that matched their unique needs and preferences
- Demonstrate strong communication and interpersonal skills to build lasting client relationships

Private Dentist

June 2023 - October 2024

Registered Dental Assistant

- Assist dentists during examinations, procedures, and treatments by preparing instruments, materials, and patients.
- Provide chairside support by handing instruments, suctioning, and ensuring patient comfort throughout procedures.
- Educate patients on oral hygiene practices, post-treatment care, and preventive dental health.
- Maintain accurate and confidential patient records, treatment notes, and charting.
- Prepare, sterilize, and organize dental instruments and equipment in accordance with OSHA and infection control standards.
- Ensure treatment rooms are fully stocked, sanitized, and ready for each patient.
- Support dental practice efficiency by managing supply inventory and placing orders when necessary.

Physicians Office

January 2023 - June 2023

Receptionist

- Greeted patients and families warmly, ensuring a welcoming and child-friendly environment.
- Answered and directed high-volume incoming calls, scheduled appointments, and coordinated follow-ups.
- Verified insurance coverage, processed patient registrations, and updated electronic health records (EHR) accurately.
- Collected co-pays, processed billing transactions, and balanced daily payment reports.
- Communicated effectively with parents and guardians regarding appointment reminders, prescription refills, and office procedures.
- Maintained confidentiality by following HIPAA regulations when handling sensitive patient information.
- Coordinated with medical staff to manage patient flow and minimize wait times.
- Assisted in organizing patient files, scanning documents, and keeping records up to date in the system.
- Supported pediatric staff with administrative tasks, such as preparing patient charts and distributing forms.
- Monitored the reception area to ensure cleanliness, safety, and an inviting environment for children and families.

State Farm Insurance

June 2022 - January 2023

Office team member

- General knowledge of different types of insurance plans, including home, business, and automotive
- Demonstrate excellent written and verbal communication skills
- Maintain compliance with state insurance laws, carrier guidelines, and agency policies.
- Stay up to date with industry trends, underwriting requirements, and policy changes

CERTIFICATIONS

Licensed P&C, Life & Health in: WI

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

Experience: State Farm 2 years, Allstate 1.5 years

Licensed P&C, Life & Health in: WI

Will work REMOTE in any time zone

Desires a Sales role with an Agency @ \$38k base, with \$50k+ earning potential

70 outbound dials/day, 40 inbound calls, referral sales, pivot & cross selling, & providing excellent customer service.