

# Direct Hire Candidate: 5573 \*\*3-4 LIFE APPS/MO\*\*

Licensed Insurance Producer

## EXPERIENCE

### State Farm Insurance

November 2024 - Present

Insurance Sales Representative

- Responded to client calls and emails to resolve questions on policy transactions, coverage, billing, and account updates.
- Proactively followed up with clients to obtain missing documents and ensure timely policy processing.
- Maintained accurate logs of product transactions and sales using Excel (tracking status, dates, and outcomes).
- Educated clients on insurance products and recommended options aligned with their needs and budgets.
- Triageed and assisted inbound inquiries on claims, documentation, and service requests, escalating when appropriate.
- Coordinated with internal teams (underwriting/claims/service) to expedite resolutions and deliver a seamless client experience.
- Protected sensitive information by adhering to compliance, privacy, and documentation standards.

### Real Estate Brokerage

December 2023 - November 2024

Realtor

- Responded promptly to client calls and emails regarding questions and concerns about real estate transactions.
- Followed up with clients to obtain missing documentation required for processing and closing.
- Utilized Excel spreadsheets to track, document, and update transaction and sales activity.
- Coordinated with agents to communicate upcoming deadlines, scheduling adjustments, and calendar changes.
- Monitored and tracked documentation uploads to ensure accuracy, timeliness, and successful transition during closing proceedings.
- Supported a smooth closing process by maintaining organized records and proactively addressing potential delays.

### Financial Advisory Services

July 2023 - December 2023

Remote Securities Operations Service Specialist

- Reviewed deceased client accounts ranging from \$0.01 to \$1,000,000+ to ensure accuracy and compliance.
- Processed complete liquidation of accounts, including removal of money market sweeps and settlement of remaining balances.
- Wired funds from brokerage accounts, ensuring proper documentation and timely completion of transfers.
- Utilized Excel spreadsheets to track account movements, maintain accurate records, and provide reporting.
- Verified account standing and available funds to complete transactions in accordance with company policies.
- Coordinated closely with financial advisors and stock brokers to resolve issues related to fund transfers and account closures.
- Ensured a seamless transfer of assets by managing sensitive financial data with confidentiality and precision.

### Self-Employed

September 2022 - July 2023

Caregiver

- Scheduled, rescheduled, and canceled client appointments to ensure timely and accurate care delivery.
- Assisted clients with daily living activities, including bathing, dressing, feeding, and mobility support.
- Performed light housekeeping tasks such as cleaning, laundry, and meal preparation to maintain a safe and comfortable environment.
- Delivered medications and food to clients, ensuring proper handling and adherence to schedules.
- Provided compassionate and reliable care while maintaining client dignity and comfort.

## EDUCATION

### Private University

Bachelor Degree

## CERTIFICATIONS

Licensed P&C, Life & Health: IL, MO

## **Direct Hire Candidate: 5573 \*\*3-4 LIFE APPS/MO\*\***

---

Licensed Insurance Producer

Reported: 25 policies/month, \$40k premium/month

Experience: State Farm 1 year, Progressive 2 years

Licensed P&C, Life & Health: IL, MO

Will work REMOTE in EST or CST

Desires a Sales role with a State Farm Agency @ \$35–40k base, with the ability to earn \$75k total

35 outbound calls/day, 15 inbound calls using lead vendors, win-backs, pivot and cross selling, referral sales, and customer service. They also report an average of 3-4 new life policies per month.