

# Direct Hire Candidate: 5589

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Licensed Insurance Producer

## EXPERIENCE

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### Allstate Insurance

September 2024 - Present

#### Outbound Sales Insurance Agent

- Drove sales growth by engaging prospective customers through inbound and outbound calls, consistently meeting and exceeding monthly sales targets.
- Applied insurance expertise to uncover client needs, identify coverage gaps, and recommend appropriate solutions across Allstate and affiliated brands.
- Converted prospects into policyholders using a proven consultative sales strategy, building long-term customer relationships.
- Delivered clear and effective communication of policy features, benefits, and exclusions to support informed decision-making.
- Maintained accurate documentation of client interactions in CRM systems, ensuring compliance with industry and company standards.

### Financial Institution

March 2022 - September 2024

#### Business Banking Specialist

- Performed customer service actions for an intricate suite of Business Banking products and services, delivering consistent, high-quality support.
- Resolved customer issues across multiple channels with efficiency and professionalism, leveraging advanced processes and tools.
- Applied the CARES model to interactions, strengthening both client and internal partner relationships.
- Handled inbound calls through the Customer Care Center, addressing complex and recurring issues, and recommending effective solutions.
- Interacted with senior-level contacts within client organizations while maintaining high levels of satisfaction consistent with PNC's core values.
- Filed escalations when necessary, ensuring timely resolution of issues requiring additional action.
- Documented customer exchanges and executed service requests to reduce client effort and improve overall experience.
- Actively engaged in team meetings, collaborating with colleagues to improve service delivery and meet performance goals.
- Demonstrated strong commitment to quality, schedule adherence, and customer-first service delivery.

### Mortgage Broker

December 2021 - February 2022

#### Mortgage Loan Originator

- Assisted clients with purchasing and refinancing by guiding them through the loan process from application to closing.
- Efficiently utilized Wemlo Loan Origination System (LOS) to complete applications, process documentation, and maintain accurate loan files.
- Communicated directly with account executives from multiple lenders to ensure smooth loan processing and timely approvals.
- Supported clients by explaining loan options, documentation requirements, and next steps throughout the mortgage process.
- Networked within the community to generate new leads, strengthening client pipelines and driving business growth.
- Ensured compliance with lending regulations, company policies, and industry standards during loan preparation and closing.

## EDUCATION

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### Community College

Bachelor Degree

## CERTIFICATIONS

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Licensed P&C in: All 50 states

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Licensed Insurance Producer

Reported: 115–125 items/mo, \$115–125k premium/mo

Experience: Allstate 1 year (Corporate Outbound Sales)

Licensed P&C in: All 50 states

Will work REMOTE in EST or CST \*\*\*MUST OFFER HEALTH/STIPEND\*\*\*

Desires a Sales role with an Allstate agency @ \$40–45k base, with \$65k+ earning potential

70+ outbound calls/day, 5+ inbound calls, pivot & cross selling, bundling, raw new sales, & customer service.