

Direct Hire Candidate: 5588

Licensed Insurance Producer

EXPERIENCE

Insurance Agency

October 2019 - Present

Office Manager

- Directed daily office operations, including staff scheduling, client communications, and workflow management.
- Conducted comprehensive policy reviews and developed tailored insurance proposals across multiple property and casualty lines.
- Educated clients on coverage options, effectively addressing specific risks and financial needs.
- Built and maintained a robust client portfolio through proactive follow-ups and exceptional customer service.
- Organized and led external marketing initiatives to enhance agency visibility and drive client engagement.
- Oversaw the onboarding and training of new employees, ensuring adherence to company standards and compliance requirements.
- Delegated renewal responsibilities to team members while maintaining oversight to ensure accuracy and timeliness.
- Provided leadership to create an efficient, compliant, and customer-focused office environment.

Farmers Insurance

July 2018 - October 2019

Licensed Insurance Producer

- Provided accurate and timely insurance quotes to prospective clients via inbound and outbound communications.
- Identified client needs and matched them with appropriate insurance products to ensure adequate coverage.
- Achieved consistent new business growth through proactive outreach, lead follow-up, and delivering high-quality service.
- Educated clients on policy features, terms, and coverage options, enabling informed decision-making.
- Built and maintained positive client relationships, driving referrals and repeat business.
- Ensured compliance with underwriting guidelines and regulatory standards throughout the quoting and binding process.

Allstate Insurance

April 2012 - July 2018

Office Manager & Lead Sales Producer

- Managed daily office operations, including payment processing, client relations, and administrative functions to ensure seamless workflow.
- Resolved client issues efficiently, enhancing satisfaction, retention, and long-term relationships.
- Developed standardized sales scripts and communication strategies, improving outbound sales performance and consistency across the team.
- Oversaw policy servicing, renewals, and endorsements, ensuring accuracy and compliance with carrier and regulatory requirements.
- Collaborated with agents and staff to streamline processes, boosting efficiency and overall office productivity.

CERTIFICATIONS

Licensed P&C, Life & Health in: TX

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Reported: 30–40 items/mo, \$40–50k premium/mo

Experience: Allstate 12 years, Independent 4 years, Farmers 1.5 years

Licensed P&C, Life & Health in: TX

Will work REMOTE in any time zone ***MUST OFFER HEALTH/STIPEND***

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

50+ outbound dials/day, 5+ inbound calls, referral sales, pivot & cross selling, bundling, re-quotes, developing their own leads, & customer service.