

Trilingual Spanish/Portuguese Hire: 5591

Licensed Insurance Producer

EXPERIENCE

Branch Financial

March 2023 - January 2024

Customer/Member Support

- Received inbound calls and assisted customers/members with coverage needs in a professional and timely manner.
- Processed premium payments, ensuring accuracy and compliance with company standards.
- Handled policy changes and updates, including endorsements, cancellations, and renewals.
- Educated potential customers on coverage options, highlighting gaps in protection and recommending suitable solutions.
- Offered and cross-sold property, renters, and life insurance coverage tailored to individual customer needs.
- Delivered exceptional customer service by addressing questions, resolving issues, and ensuring client satisfaction.
- Maintained accurate records of client interactions in company systems to support efficient service and compliance.
- Contributed to meeting sales and retention goals through proactive communication and personalized service.

Allstate Insurance

July 2022 - March 2023

Sales Representative

- Handled inbound calls from prospective and existing clients, delivering excellent customer service while addressing insurance inquiries.
- Conducted outbound calls to potential clients, introducing insurance products and generating new business opportunities.
- Prepared and delivered accurate insurance quotes tailored to client needs, ensuring clear communication of options and benefits.
- Educated prospects on coverage options, policy features, and financial protection strategies, ensuring they understood each product fully.
- Built trust and rapport with clients by providing transparent explanations and addressing concerns promptly.
- Maintained compliance with company policies and industry regulations while processing client information and documentation.
- Collaborated with the agency team to meet and exceed monthly sales and retention goals.

Landscaping Company

July 2018- July 2022

Spray Technician/ Sales Representative

- Mixed and applied proper pesticide, herbicide, and fertilizer treatments in compliance with safety and regulatory standards.
- Advised customers on the most effective application plans to meet their lawn care needs and improve results.
- Performed scheduled pesticide applications, ensuring accurate coverage and proper use of equipment.
- Upsold additional lawn care plans and services to enhance customer satisfaction and revenue growth.
- Scouted neighborhoods and identified potential customers, contributing to business development.
- Maintained, calibrated, and repaired pesticide application equipment to ensure reliability and safety.
- Drove, maintained, and inspected company vehicles to ensure safe operation and regulatory compliance.

Allstate Insurance

October 2013- July 2018

Sales Representative

- Sold diverse lines of insurance policies—including auto, home, life, health, property, fire, medical, and dental—to both individuals and businesses.
- Handled specialized policies such as marine, farm/crop, and medical malpractice, tailoring solutions to unique client needs.
- Prospected and developed new business through networking, referrals, and targeted outreach, consistently expanding the client base.
- Generated and managed lists of prospective clients to build a strong sales pipeline.
- Delivered and explained insurance policies to policyholders, ensuring full understanding of coverage, benefits, and obligations.
- Analyzed insurance programs and provided expert recommendations for additions, changes, or beneficiary updates.
- Customized insurance programs to suit individual client needs, mitigating risks across multiple coverage areas.
- Built and maintained strong client relationships through regular follow-ups, policy reviews, and responsive customer service.

CERTIFICATIONS

Licensed P&C, Life & Health in: SC, CT

Trilingual Spanish/Portuguese Hire: 5591

Licensed Insurance Producer

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

Experience: Allstate 4.2 years, Independent 9 months

Licensed P&C, Life & Health in: SC, CT

Will work REMOTE in EST or CST

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

100+ outbound dials/day, 10+ inbound calls with live leads, referral sales, pivot & cross selling, bundling, self lead generation, & customer service. They also specialize in selling and servicing Spanish & Portuguese speaking clientele, making them a valuable trilingual addition to any agency team.