

# Direct Hire Candidate: 5601 \*\*1-2 LIFE, 3-4 HEALTH APPS/MO\*\*

Licensed Insurance Producer

## EXPERIENCE

### State Farm Insurance

August 2023- July 2025

Insurance Sales Representative

- Sold a variety of insurance products, including auto, home, and life insurance, tailored to meet individual client needs.
- Educated clients on policy features, coverage options, and terms, ensuring clear understanding and informed decision-making.
- Collaborated with senior agents to identify cross-selling opportunities, successfully increasing customer lifetime value and overall product penetration.
- Managed and maintained accurate records of client interactions, processed new applications, and handled policy updates and modifications efficiently.

### Financial Services

June 2022 - June 2023

Contingent Worker

- Served as a key liaison between clients, vendors, and internal teams to investigate and resolve platform-related issues via phone and written communication, ensuring swift and effective resolutions.
- Utilized ticketing systems such as Salesforce and Keystone to document and track case progress, often troubleshooting with minimal information and coordinating with technical experts to resolve client concerns.
- Facilitated the opening of new accounts—including trusts, IRAs, and brokerage accounts—for both new and existing clients, ensuring regulatory and compliance standards were met.
- Partnered with account managers and their teams to verify receipt of all necessary documentation for account openings, maintaining a smooth and compliant onboarding process.
- Confirmed client signatures and documentation for account activation, enabling timely transition to active trading and investment management.

### Staffing and Employment Agency

March 2021 - March 2022

Phone Recruiter

- Conducted preliminary phone interviews with candidates sourced from Indeed to assess qualifications, experience, and job fit for open positions.
- Evaluated applicant responses to structured interview questions and documented key details including contact information and work history.
- Scheduled qualified candidates for in-person interviews and sent follow-up emails with detailed interview logistics.
- Maintained accurate daily tracking in Excel spreadsheets, recording outbound calls, interviews conducted, and attendance rates for scheduled interviews.
- Played a key role in streamlining the candidate pipeline by ensuring timely communication and proper documentation throughout the recruitment process.

## EDUCATION

### Public University

Bachelor Degree

## CERTIFICATIONS

Licensed P&C, Life & Health in: FL, OK, TX, MN

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Licensed Insurance Producer

Reported: 25–35 items/mo, \$35–45k premium/mo

Experience: State Farm 2.1 years

Licensed P&C, Life & Health in: FL, OK, TX, MN

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

Desires a Sales role with any agency @ \$40–45k base, with \$70k+ earning potential

100+ outbound dials/day, 5+ inbound calls with live lead transfers, referral sales, pivot & cross selling, bundling, selling raw new leads, & customer service. They also report 1–2 new life sales per month, along with 3–4 health products.