

Direct Hire Candidate: 5603 ***2-3 LIFE APPS/MO***

Licensed Insurance Producer

EXPERIENCE

State Farm Insurance

June 2020 - Present

Licensed Insurance Producer

- Proactively identify and pursue new business opportunities through cold calling, networking events, referrals, and other lead generation strategies to grow the client base.
- Conduct thorough needs assessments with clients to evaluate insurance requirements, assess risk exposure, and recommend suitable personal, commercial, or specialty insurance solutions.
- Design and tailor insurance policies to meet individual client needs, ensuring adequate coverage and competitive pricing in line with industry standards.
- Generate accurate, timely insurance quotes and present policy options to clients in a clear, concise, and consultative manner.
- Foster long-term client relationships by providing ongoing support, conducting periodic policy reviews, and assisting with renewals or changes in coverage.
- Consistently meet or exceed sales goals through effective closing techniques, upselling, and delivering exceptional customer service to drive retention.
- Handle all required documentation, maintain up-to-date client records, and ensure full compliance with internal policies and regulatory requirements.
- Partner with underwriters, claims adjusters, and customer service teams to streamline policy processing, address client issues, and ensure a seamless customer experience.

Allstate Insurance

April 2017 - June 2020

Licensed Insurance Producer

- Responded promptly and professionally to client inquiries related to policy coverage, billing, claims, and coverage options, ensuring a high standard of customer satisfaction.
- Assisted clients in managing and modifying insurance policies, including adding vehicles, updating coverage limits, changing personal information, and modifying beneficiaries.
- Guided clients through the claims process from start to resolution—helping with filing, providing updates, and liaising with adjusters to ensure timely and accurate handling.
- Facilitated timely policy renewals, communicated changes in terms or premiums, and recommended additional coverage based on clients' evolving needs.
- Maintained accurate records by processing policy changes, endorsements, and documentation in the agency's management system, in compliance with company and regulatory standards.
- Identified and resolved client concerns related to billing discrepancies, coverage gaps, claim disputes, and policy errors with a solutions-oriented approach.
- Ensured all client interactions, documentation, and policy handling complied with relevant insurance laws, company protocols, and data privacy standards.

CERTIFICATIONS

Licensed P&C, Life & Health in: MI

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

Experience: State Farm 5 years, Allstate 3 years

Licensed P&C, Life & Health in: MI

Will work REMOTE in any time zone

Desires a Sales or Hybrid role with a State Farm or Allstate agency @ \$45–50k+ base, with \$70k+ earning potential

70+ outbound calls/day, 25+ inbound calls with live leads, pivot & cross selling, referral sales, policy reviews, bundling, networking, & customer service. They also report selling 2–3 new life policies per month.