

# Direct Hire Candidate: 5599 \*\*\*2-3 LIFE APPS/MO\*\*\*

Licensed Insurance Producer

## EXPERIENCE

### State Farm Insurance

September 2022- September 2025

Licensed Insurance Produce

- Educated clients on insurance products and policy options, providing tailored solutions to meet individual and business needs.
- Developed and maintained relationships with new and existing clients, resulting in high customer retention and satisfaction.
- Processed new applications, policy renewals, and amendments with accuracy and attention to compliance requirements.
- Utilized CRM systems (e.g., Salesforce, Agency Management System) to track leads, follow-ups, and sales progress.
- Conducted in-depth risk assessments and coverage reviews to ensure clients had adequate protection.
- Cross-sold additional State Farm products such as auto, home, renters, life, and disability insurance to maximize coverage and revenue.
- Collaborated with underwriters and claims adjusters to ensure smooth policy issuance and claim resolution for clients.
- Maintained up-to-date knowledge of insurance regulations, industry trends, and State Farm product offerings.
- Delivered exceptional customer service by resolving inquiries, policy issues, and billing concerns promptly and professionally.
- Supported the agency's day-to-day operations, including administrative tasks, reporting, and compliance documentation.

### Insurance Company

August 2017 - July 2022

Licensed Life Insurance Agent

- Provided personalized financial solutions, including life insurance, retirement strategies, and income protection, tailored to client needs.
- Educated clients on insurance products such as term, whole, and universal life policies to ensure informed decision-making.
- Prospected and built a book of business through referrals, cold calling, community networking, and lead generation tools.
- Conducted in-depth financial needs analyses to recommend appropriate coverage and long-term financial strategies.
- Delivered client-centric service by following up regularly to review policies, update beneficiary information, and address changing needs.
- Used CRM software and Transamerica systems to manage client data, track interactions, and schedule follow-ups.
- Completed all continuing education and compliance requirements to maintain active licensing and stay updated on industry regulations.
- Assisted clients with claims processes, policy updates, and premium payments to ensure satisfaction and retention.
- Collaborated with senior agents and managers on case design, presentations, and joint fieldwork for high-value clients.
- Maintained a high level of ethical standards and compliance with company's code of conduct and suitability guidelines.

### Daycare Facility

May 2012 - July 2017

Daycare Provider

- Planned and implemented age-appropriate educational and recreational activities to support early childhood development.
- Maintained a structured daily routine including meals, naps, playtime, and learning activities to promote stability and growth.
- Ensured the health and safety of all children by adhering to hygiene practices, administering basic first aid, and monitoring for illness.
- Built strong relationships with parents through daily communication, progress reports, and addressing concerns with professionalism.
- Promoted social, emotional, and cognitive development through interactive play, storytelling, music, and sensory activities.
- Collaborated with parents and specialists to support children with behavioral or developmental challenges.
- Kept environment clean, organized, and compliant with state childcare safety regulations and licensing standards.
- Managed multiple children with differing needs, demonstrating strong multitasking and time management abilities.
- Encouraged inclusivity and emotional support to help children develop confidence and positive self-esteem.

## CERTIFICATIONS

Licensed P&C, Life & Health in: IL, IN, KY, IA, NE

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Licensed Insurance Producer

Reported: 50–60 policies/mo, \$45–55k premium/mo

Experience: State Farm 8.7 years, Independent 7.3 years

Licensed P&C, Life & Health in: IL, IN, KY, IA, NE

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

Desires a Sales role with a State Farm agency @ \$40–45k base, with \$75k+ earning potential

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