

# Direct Hire Candidate: 5632 \*\*\*3-4 LIFE APP/MO\*\*\*

---

Licensed Insurance Producer

## EXPERIENCE

---

### Allstate Insurance

May 2025 - Present

Licensed Sales Producer

- Drove sales growth by building and nurturing client relationships through consistent follow-up and strategic outreach.
- Executed needs-based sales consultations to uncover coverage gaps and present tailored insurance solutions that drove policy conversions.
- Proactively prospected and qualified new leads, set high-impact appointments, and consistently identified cross-sell and upsell opportunities.
- Successfully marketed and sold a comprehensive portfolio of insurance products, including property, auto, life, health, and liability, to meet diverse client needs.
- Delivered customized insurance solutions that aligned with client goals, resulting in increased policy sales and improved retention rates.
- Applied consultative sales techniques to close deals efficiently, maximize policy value, and exceed sales targets.

### State Farm Insurance

August 2023 - May 2025

Licensed Account Associate

- Fostered strong, trust-based relationships with clients by delivering attentive, responsive, and personalized customer service.
- Guided customers through a needs-based review process to ensure they understood their insurance options and felt confident in their coverage decisions.
- Proactively followed up with clients to address questions, provide ongoing support, and maintain long-term satisfaction.
- Provided dedicated account servicing, including processing policy and coverage changes to ensure clients' needs were consistently met.
- Delivered tailored insurance solutions by actively listening to customers and aligning products with their personal and financial goals.
- Cross-sold property, auto, life, health, and liability insurance with a focus on educating clients and adding value to their overall protection plan.
- Acted as a reliable point of contact for policy inquiries, claims assistance, and service-related concerns, ensuring a positive client experience from start to finish.

### Mortgage Services Company

August 2021 - May 2023

Senior Mortgage Loan Closer

- Reviewed final closing documents for mortgage loan modifications, including partial claim agreements, to ensure accuracy and compliance with internal and regulatory standards.
- Assessed borrower location-specific requirements to identify and request additional documentation as needed for loan finalization.
- Cross-checked system data against submitted documents to verify accuracy of loan terms, interest rates, payment schedules, and modification details.
- Attended daily digital team meetings to stay up to date on procedural updates and ensure adherence to quality and productivity standards.
- Maintained detailed Excel spreadsheets to track loan assignments, monitor progress, and follow up on pending accounts in a timely manner.
- Collaborated with internal departments to resolve discrepancies, clarify account issues, and ensure seamless processing of loan modifications.
- Performed critical decision-making tasks such as pending, rejecting, or approving loans based on document review and compliance requirements.

## CERTIFICATIONS

---

Licensed: P&C, Life & Health – LA, MS

## Direct Hire Candidate: 5632 \*\*\*3-4 LIFE APP/MO\*\*\*

---

Licensed Insurance Producer

Reported: 45–55 policies/mo, \$40–50k premium/mo

Experience: State Farm 1.8 years, Allstate 5 months

Licensed: P&C, Life & Health – LA, MS

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

Desires a Sales role with a State Farm agency @ \$45k base, with \$80k earning potential

60+ outbound calls/day, 5+ inbound calls with live leads, pivot & cross selling, developing their own leads, referral selling, bundling, & customer service. The candidate reports selling 3–4 new life policies per month.