

Direct Hire Candidate: 5818 ***5-10 LIFE APP/MO***

Licensed Insurance Producer

EXPERIENCE

Allstate Insurance

June 2023 - Present

Licensed Sales Producer

- Generated new business through inbound and outbound sales efforts, referrals, and community networking
- Conducted needs-based consultations to recommend appropriate coverage and policy options
- Educated clients on insurance products, coverage limits, deductibles, and policy features to support informed decisions
- Quoted, bound, and issued policies in compliance with state regulations and company underwriting guidelines
- Maintained strong client relationships through proactive service, renewals, and cross-selling opportunities
- Utilized CRM and agency management systems to track leads, document interactions, and manage pipelines
- Collaborated with agency staff to support retention, claims assistance, and customer satisfaction
- Ensured compliance with Allstate policies, licensing requirements, and ethical sales standards

Healthcare Company

January 2023 - Present

Licensed Sales Broker

- Licensed insurance broker specializing in Medicare Advantage, Medicare Supplement, Prescription Drug Plans, and ancillary health products
- Educated prospective and existing clients on Medicare options, eligibility requirements, and plan benefits to support informed enrollment decisions
- Conducted compliant needs-based sales presentations in accordance with company guidelines
- Generated new business through referrals, outbound prospecting, community events, and inbound leads
- Assisted clients with plan comparisons, enrollment applications, and ongoing policy servicing
- Maintained accurate documentation and records to ensure regulatory compliance and audit readiness
- Built and maintained long-term client relationships to support retention and renewal efforts
- Stayed current on Medicare regulations, plan updates, and annual enrollment period (AEP) requirements

Liberty Mutual Insurance

July 2021 - May 2023

Licensed Insurance Representative

- Consulted with prospective and existing customers to assess risk exposure and recommend appropriate coverage solutions
- Quoted, issued, and serviced policies in accordance with state regulations and Liberty Mutual underwriting guidelines
- Educated customers on policy features, coverage limits, deductibles, and premium options to support informed decisions
- Generated new business through inbound leads, outbound calls, cross-selling, and referral opportunities
- Maintained strong customer relationships to support retention, renewals, and upsell opportunities
- Documented customer interactions accurately using CRM and policy management systems
- Collaborated with internal teams to resolve billing, claims inquiries, and policy changes efficiently
- Ensured adherence to regulatory, ethical, and company compliance standards

*** Please note: Employment dates are approximate*

EDUCATION

Public University

Bachelor Degree

CERTIFICATIONS

Licensed: P&C – PA, FL | Life & Health – PA

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Licensed Insurance Producer

Reported: 40–50 items/mo, \$35–45k premium/mo
Experience: Allstate – 2.3 years, Liberty Mutual – 2 years
Licensed: P&C – PA, FL | Life & Health – PA
Will work REMOTE in EST only

Desires a Sales role with an Allstate or State Farm agency @ \$40–45k+ base, with \$80k+ earning potential

50+ outbound dials/day, 10+ inbound calls, live lead transfers, referral sales, pivot & cross selling, self-lead generation, networking, & customer service. Reports 5+ life policies per month during time with Liberty Mutual.

*** Please note: Employment dates are approximate*