

# Direct Hire Candidate: 5894 \*\*\*3-5 LIFE APP/MO\*\*\*

Licensed Insurance Producer

## EXPERIENCE

### State Farm Insurance

January 2025 - Present

#### Agent Team Member

- Deliver personalized insurance and financial solutions while supporting high-volume sales and service operations in a fast-paced agency environment.
- Consistently exceed sales targets through consultative selling, needs-based analysis, and tailored coverage recommendations.
- Manage end-to-end policy servicing, including renewals, endorsements, billing inquiries, and claims support, to drive client retention and satisfaction.
- Provide accurate, timely quotes and policy recommendations in collaboration with agents to ensure efficiency, compliance, and exceptional client experience.
- Leverage CRM systems and agency management software to streamline workflows, improve response times, and enhance overall operational performance.
- Earn multiple positive online client reviews by delivering high-quality service, proactive communication, and effective problem resolution.

### Insurance Company

June 2020 - January 2025

#### Life Insurance Broker

- Drove significant revenue growth through consultative life insurance sales and advanced estate planning strategies for high-net-worth and complex client portfolios.
- Consistently exceeded sales targets by delivering customized financial protection solutions aligned with clients' long-term wealth, legacy, and risk management goals.
- Conducted comprehensive financial needs analyses to identify risk exposure, estate planning gaps, liquidity concerns, and wealth transfer opportunities.
- Built strong, trust-based client relationships by translating complex financial and insurance concepts into clear, actionable strategies.
- Designed and implemented tailored insurance structures to support wealth preservation, tax-efficient asset transfer, and long-term financial security.
- Maintained current knowledge of industry trends, regulatory developments, and product innovations to ensure compliant, forward-thinking advisory solutions.

### Retail

January 2017 - June 2020

#### Retail Sales Associate

- Consistently exceeded sales targets in the through strong product expertise, consultative selling, and relationship-driven customer engagement.
- Built a loyal customer base through trust-based service, in-depth product education, and long-term relationship development.
- Demonstrated comprehensive knowledge of products to provide credible, expert guidance and drive informed purchasing decisions.
- Supported store operations through effective inventory management, visual merchandising, and showroom presentation to enhance the customer experience.
- Contributed to a positive, high-performance team culture by collaborating with colleagues to uphold exceptional service standards and customer satisfaction.

\*\* Please note: Employment dates are approximate

## EDUCATION

### Community College

Associate Degree

## CERTIFICATIONS

Licensed: P&C, Life & Health – CA, AZ, OR

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Licensed Insurance Producer

Reported: 40-50 policies/mo, \$30-40k premium/mo

Experience: State Farm - 1.1 years | Symmetry Financial (Life Sales) - 4.7 years

Licensed: P&C, Life & Health - CA, AZ, OR

Will work REMOTE in any time zone

Desires a Sales role with a State Farm agency @ \$40-45k base, with \$70k+ earning potential

100+ outbound dials/day, 5+ inbound calls, pivot & cross selling, developing their own leads, referral sales, bundling, selling raw leads, & customer service. Strong life background reporting 3-5 new life policies per month.

*\*\* Please note: Employment dates are approximate*