

Direct Hire Candidate: 6026

Licensed Insurance Producer

EXPERIENCE

Financial Services Company

2019 - Present

Representative

- Generated new business through prospecting, referrals, and telemarketing within a financial services environment
- Educated clients on comprehensive financial solutions including life insurance, credit improvement, investments, and mortgage options
- Conducted needs-based consultations to recommend personalized financial strategies and protection plans
- Provided and processed life insurance applications, ensuring accurate underwriting and policy placement
- Built and maintained long-term client relationships to support retention and ongoing financial planning needs
- Collaborated with team members and leadership to develop strategies for market expansion and client acquisition
- Leveraged consultative sales and upselling techniques to identify opportunities across multiple financial products
- Supported clients in improving financial health through credit-building guidance and debt management solutions

Allstate Insurance

October 2023 - November 2025

Licensed Sales Producer

- Generated production and qualified leads through high-volume telemarketing sales efforts
- Provided insurance quotes and bound coverage for new business through Allstate and affiliated broker partners
- Executed cross-selling campaigns to expand coverage within existing client accounts
- Collaborated directly with the agency owner to develop and implement new market strategies for business growth
- Identified opportunities to increase client retention and revenue within the existing book of business
- Applied consultative sales and upselling techniques to convert prospects into qualified leads and policyholders

Allstate Insurance

August 2022 - September 2023

Licensed Insurance Producer (Remote)

- Generated new business and qualified leads through remote prospecting, outbound calling, and digital communication channels
- Provided quotes and bound coverage for Property & Casualty insurance products, ensuring accurate policy placement and compliance
- Delivered consultative sales experiences to assess client needs and recommend appropriate coverage options
- Executed cross-selling strategies to expand existing accounts and increase policy value
- Managed the full sales cycle remotely, from initial contact through policy issuance and follow-up
- Built and maintained client relationships through virtual platforms, ensuring high customer satisfaction and retention
- Collaborated with team members and leadership to refine remote sales strategies and improve conversion rates
- Utilized CRM systems and digital tools to track leads, manage pipelines, and optimize sales performance

*** Please note: Employment dates are approximate

CERTIFICATIONS

Licensed: P&C, Life & Annuity – PA

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Licensed Insurance Producer

Reported: 20–30 items/month, \$25–30k premium/month

Experience: Allstate – 6 years, Local State Farm Agency (Operated by Independently Contracted Agent) - 5 months

Licensed: P&C, Life & Annuity – PA

Will work REMOTE in EST

Desires a Sales role with Any agency @ \$40k base, with \$65–75k earning potential

200 outbound dials/day, 40–60 inbound calls with lead systems, live lead transfers & current customers.

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