

Direct Hire Candidate: 6024 ***2-3 LIFE APP/MO***

Licensed Insurance Producer

EXPERIENCE

Insurance Agency

July 2025 - Present

Commercial Insurance Account Manager

- Clearly explained complex insurance concepts to customers, ensuring a strong understanding of coverage options and policy details
- Maintained accurate and detailed records of customer interactions within the CRM system to support follow-ups and relationship management
- Advised customers on risk management strategies to minimize potential losses and optimize policy benefits
- Participated in ongoing training to stay current on insurance regulations, product updates, and industry best practices

Local State Farm Agency (Operated by Independently Contracted Agent)

March 2025 - May 2025

Agent Team Member

Local State Farm Agency (Operated by Independently Contracted Agent)

November 2021 - May 2024

Agent Team Member

- Identified and pursued prospective clients through leads and referrals to drive business growth
- Scheduled and coordinated client meetings to discuss insurance needs and coverage options
- Conducted timely follow-up calls to maintain engagement and move prospects through the sales pipeline
- Provided informed recommendations on insurance coverage tailored to individual client needs
- Performed regular policy reviews to ensure coverage remained aligned with clients' evolving circumstances
- Prepared and presented comprehensive insurance proposals outlining suitable options and benefits
- Gathered required documentation and submitted complete applications to underwriters for processing

Self-Employed

July 2014 - November 2021

Independent Insurance Agent

- Assessed customers' financial status and coverage needs to recommend tailored protection plans across multiple carriers
- Built and maintained a strong pipeline of prospective clients through networking, cold calling, and referrals
- Collaborated with clients to develop risk management strategies aligned with their individual risk profiles
- Continuously expanded product knowledge and stayed current on new services and industry developments
- Ensured all policy requirements were accurately completed and met in a timely manner

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

CERTIFICATIONS

Licensed: P&C, Life & Health – DE, MD, WA, WV, VA, OR, NV, CA, AZ

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Licensed Insurance Producer

Reported: 30–40 policies/month, \$20–30k premium/month

Experience: Independent – 7.3 years, Local State Farm Agency (Operated by Independently Contracted Agent) – 3.5 years, Allstate – 2 months

Licensed: P&C, Life & Health – DE, MD, WA, WV, VA, OR, NV, CA, AZ, PA

Will work REMOTE in EST (preferred) or CST

Desires a Sales role with a Local State Farm Agency (Operated by Independently Contracted Agent) @ \$40–45k base, with \$60k+ earning potential

100+ outbound dials/day, 15+ inbound calls, pivot & cross selling, bundling, win-backs, referral sales, creating lead lists, networking & customer service. Reports producing 2–3 new life policies per month.

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