

Bilingual Spanish Hire: 6030

Licensed Insurance Producer

EXPERIENCE

Local State Farm Agency (Operated by Independently Contracted Agent)

April 2023 - December 2025

Agent Team Member

- Developed and maintained strong client relationships by delivering personalized insurance solutions tailored to individual needs
- Utilized CRM software to track leads, manage customer data, and streamline the sales process
- Delivered exceptional customer service by promptly addressing inquiries, resolving issues, and processing policy updates

Professional Service Firm

December 2021 - September 2022

Bilingual Spanish Collections Agent

- Managed loan servicing and collections
- Communicated effectively with Spanish-speaking clients to resolve past-due accounts and process loan payments
- Collaborated with international teams in the Philippines and Guatemala, including training Guatemala-based staff on outbound collections and servicing procedures
- Conducted 150–200+ outbound calls daily to drive collections and customer engagement
- Collected over \$140,000 in past-due invoices, contributing to overall portfolio performance

Financial Institution

November 2019 - June 2021

Lending Solutions Specialist

- Assisted clients in establishing and servicing Pledged Asset Lines of Credit (PALs), including bridge loans backed by equities of \$100,000+
- Processed over \$500M in outgoing bank wires from lines of credit, partnering with the Move Money team to ensure accurate same-day execution
- Collaborated with Margin, Banking, and Credit teams to resolve maintenance issues, margin calls, and concentration risks
- Advised clients, investment advisors, and internal financial consultants on updates to advance rates, interest rates, and policy changes
- Delivered seamless, high-touch service by coordinating across departments and proactively communicating critical account information

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

EDUCATION

Public University

Bachelor Degree

Public University

Associate Degree

CERTIFICATIONS

Licensed: P&C, Life & Health – NY, NJ

Bilingual Spanish Hire: 6030

Licensed Insurance Producer

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

Experience: Local State Farm Agency (Operated by Independently Contracted Agent) – 2.8 years

Licensed: P&C, Life & Health – NY, NJ

Will work REMOTE in any time zone

Desires a Sales or Hybrid role with Any agency @ \$40–45k base, with \$70k earning potential

20+ outbound dials/day, 30+ inbound calls, pivot & cross selling, bundling, win-backs, selling & servicing the Spanish-speaking population & customer service.

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