

Direct Hire Candidate: 6091 ***3-4+ LIFE APP/MO***

Licensed Insurance Producer

EXPERIENCE

Local State Farm Agency (Operated by Independently Contracted Agent)

December 2019 - September 2025

Agent Team Member (3 Agents)

- Consistently met or exceeded Property & Casualty and Life insurance sales quotas
- Delivered sales and service training support to team members to strengthen product knowledge and customer experience
- Conducted customer needs-based reviews to identify coverage gaps and recommend appropriate insurance solutions
- Assisted customers with claims documentation, policy education, and ongoing service support
- Managed billing inquiries and resolved escalated customer concerns with professionalism and efficiency
- Provided office technical support and served as a trainer for internal systems, processes, and workflow best practices

Financial Institution

February 2015 - September 2019

Administrative Assistant

- Provided technical support to customers using the online customer portal, resolving access and account-related issues
- Performed accurate data entry and processed customer check deposits of up to \$500,000
- Assisted customers with ACH and check transaction inquiries, providing timely support and issue resolution
- Prepared daily NSF logs and drafted customer correspondence regarding returned payments
- Reviewed unapplied funds reports and accurately researched and applied outstanding payments
- Collected, sorted, and processed high-volume incoming mail to support daily operations
- Managed reception and multi-line phone responsibilities while troubleshooting internal system issues for staff

Law Firm

February 2012 - 2015

Accounting Administrative Assistant/ Data Entry Clerk

- Served as primary point of contact for 30+ clients and vendors, managing communications and day-to-day account support
- Issued purchase orders and processed purchase order requests to support project operations and vendor coordination
- Acted as liaison between Site Acquisition Project Managers and accounting teams to resolve billing, payment, and financial matters
- Processed check requests, prepared payments to vendors, and received client payments while maintaining accurate records
- Supported site acquisition activities including reviewing zoning requirements, lease easements, ordering drawings and supplies, and coordinating service calls
- Conducted jurisdiction outreach, assisted with building permit filings, and monitored project documentation and deadlines
- Managed incoming and outgoing mail, scheduled meetings, and provided administrative support to the Program Manager
- Maintained extensive knowledge of client deliverables to help ensure project timelines, compliance, and service expectations were met

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

CERTIFICATIONS

Licensed: P&C, Life & Health – NM

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Licensed Insurance Producer

Reported: 20–30 policies/month, \$20–30k premium/month (Retention Focus), 40–50 policies/month, \$40–50k premium/month (Sales Focus)

Experience: Local State Farm Agency (Operated by Independently Contracted Agent) – 5.5 years

Licensed: P&C, Life & Health – NM

Will work REMOTE in any time zone

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

100+ outbound calls/day, 25+ inbound calls with live leads, pivot & cross selling, developing their own leads, referral sales, retention & customer service. Reports producing 3–4+ new life policies per month.

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