

Direct Hire Candidate: 6123

Licensed Insurance Producer

EXPERIENCE

Allstate Insurance

January 2025 - Present

Licensed Insurance Agent

- Developed tailored insurance solutions by assessing client needs, coverage gaps, and risk exposure to recommend appropriate policies
- Educated clients on policy options, coverage details, and benefits, enabling informed decisions and high customer satisfaction
- Managed the claims process from initial reporting through resolution, ensuring timely communication and maintaining strong client relationships
- Partnered with underwriters to evaluate risk factors, improve policy accuracy, and optimize coverage offerings for clients
- Trained and mentored junior agents on insurance compliance requirements, customer service standards, and effective sales techniques
- Implemented customer retention initiatives and referral-generation strategies that strengthened client loyalty and increased new business opportunities
- Maintained accurate policy documentation and ensured compliance with industry regulations and company guidelines

Financial Institution

January 2024 - 2025

Relationship Banker

- Delivered exceptional customer service by resolving client concerns promptly, professionally, and with a strong focus on empathy and relationship building
- Assisted clients in reaching financial goals by recommending banking products and services tailored to individual needs
- Increased investment product sales through detailed financial needs assessments and consultative product recommendations
- Built and maintained strong client relationships through proactive follow-up, personalized financial guidance, and ongoing account support
- Educated customers on available financial products, services, and investment options to support informed decision-making
- Identified cross-selling opportunities to expand client portfolios and strengthen long-term customer retention
- Maintained compliance with banking regulations, company policies, and customer confidentiality standards

Financial Institution

February 2022 - January 2024

Relationship Banker

- Strengthened client relationships by delivering personalized banking solutions and providing exceptional customer service
- Expanded the client base through strategic networking, relationship building, and referral generation efforts that increased business opportunities
- Assisted clients in achieving financial goals by recommending products and services aligned with their financial needs and objectives
- Managed multiple client accounts efficiently while maintaining accurate records and resolving account issues in a timely manner
- Collaborated with branch team members to improve operational performance and consistently achieve sales targets
- Identified opportunities to cross-sell banking products and services to deepen customer relationships and drive revenue growth
- Conducted proactive follow-up with clients to enhance retention, satisfaction, and long-term loyalty

*** Please note: Employment dates are approximate

EDUCATION

Community College

Bachelor Degree

CERTIFICATIONS

Licensed: P&C – NY

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Licensed Insurance Producer

Reported: 40–50 items/month, \$40–50k premium/month

Experience: Allstate – 3.5 years

Licensed: P&C – NY

Will work REMOTE in any time zone

Desires a Sales role with an Allstate agency @ \$40–45k base, with \$90k earning potential

150+ outbound dials/day, 10+ inbound calls, pivot & cross selling, referral sales, raw new sales & customer service.
High-energy outbound producer with strong lead generation and consistent sales activity.

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