Svetlana Greer
Licensed Medicare Insurance Agent

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STRENGTHS

Needs-Based Consultation
Asked practical questions about medications, providers, budgets, and priorities; clients gained clearer choices and greater confidence.

Plain-Language Education
Turned unfamiliar Medicare terms into calm, simple explanations; careful confirmation helped clients feel heard before deciding.

Lead Conversion
Built trust from first inbound contact through application submission; steady follow-up kept promising conversations moving.

Compliance Discipline
Checked CMS guidance, disclosures, and consent details before enrollment; quality reviewers could rely on accurate records.

Peer Coaching
Shared discovery and documentation techniques during call reviews; newer agents often sought practical advice on difficult conversations.

SKILLS

- Medicare education
- Needs-based selling
- Client consultation
- Lead conversion
- Enrollment guidance
- Carrier relationships
- CMS compliance
- Health insurance license
- Captive-agent operations
- Application documentation
- Quality assurance

SUMMARY

Licensed Medicare Insurance Agent with more than five years guiding Medicare-eligible consumers through plan selection, carrier comparisons, needs-based consultations, and compliant enrollment. Maintains an active **Wisconsin health insurance license** and current Medicare compliance training, with practical knowledge of CMS rules, required disclosures, enrollment windows, and carrier requirements. Converts inbound leads through clear conversations that connect coverage choices with medications, providers, budgets, and individual priorities. Manages **multiple carrier relationships**, application records, follow-up pipelines, **performance tracking**, and remote **captive-agent operations** with dependable accuracy. Recognized for plain-language education, thoughtful service, and client trust during important healthcare decisions. Experienced in coaching newer agents, supporting quality reviews, collaborating with managers and trainers, and working flexible evenings and weekends. Ready to help CedarPoint Medicare Services simplify Medicare enrollment and create satisfied clients.

EXPERIENCE

Senior Licensed Medicare Insurance Agent
Lakeshore Benefit Advisors | May 2024 - Present | Wauwatosa, WI

Lead remote Medicare consultations, carrier comparisons, compliant enrollments, and pipeline follow-up for high-volume inbound demand. Coach newer agents through call calibration and quality reviews, supporting accurate recommendations, strong client service, and consistent sales performance.

- Guided **Medicare clients** through needs discovery and plan comparisons using approved carrier materials and compliant consultations.
- Converted inbound **leads** into completed applications by clarifying eligibility, prescriptions, benefits, premiums, and enrollment timelines.
- Managed **multiple carrier relationships**, tracking plan availability, state requirements, and changes affecting client recommendations.
- Reviewed CMS guidance, annual certification materials, and **compliance** updates before applying changes during client conversations.
- Exceeded monthly activity and **sales** expectations through organized **pipeline follow-up** and flexible evening availability.
- Coached newer agents during call calibrations, strengthening discovery techniques and documentation quality across enrollment teams.

Licensed Medicare Sales Agent
Harborline Health Markets | January 2022 - April 2024 | Greenfield, WI

Managed **remote** captive-agent sales activity across Medicare inquiries, carrier options, applications, and follow-up workflows. Built client confidence through plain-language education, accurate documentation, performance reviews, and flexible coverage during seasonal enrollment demand.

- Managed **Medicare** inquiries by connecting coverage priorities, medications, providers, budgets, and eligibility with suitable options.
- Matched qualified clients with carrier plans after confirming service areas, enrollment windows, disclosures, and plan details.
- Completed applications and follow-up documentation with consent accuracy, audit readiness, and licensing requirements in focus.
- Used daily performance reports to prioritize outreach across contacts, appointments, applications, and pending enrollments.
- Built client trust by explaining Medicare terminology plainly and confirming comprehension before enrollment decisions.
- Covered evening and weekend demand during seasonal periods, escalating complex compliance questions through manager channels.

Performance tracking

Pipeline follow-up

Remote customer service

Agent coaching

LANGUAGES

English — Native

Russian — Proficient

MY CAREER

- Senior Licensed Medicare Insurance Agent at Lakeshore Benefit Advisors (2.3 Years)
- Licensed Medicare Sales Agent at Harborline Health Markets (2.2 Years)
- Medicare Sales Associate at Prairie Oak Insurance Group (6 Months)

Medicare Sales Associate

Prairie Oak Insurance Group | June 2021 - December 2021 | Racine, WI

Supported supervised Medicare consultations after completing carrier and CMS-focused training. Qualified leads, prepared accurate applications, maintained follow-up continuity, and developed disciplined documentation habits for compliant enrollment operations.

- Completed carrier and **CMS** training before conducting supervised Medicare conversations and independent inbound consultations.
- Qualified leads by documenting eligibility, coverage concerns, providers, prescriptions, and decision timelines in approved workflows.
- Presented plan information accurately through carrier resources, required disclosures, and needs-based questions during consultations.
- Supported enrollment submissions by verifying client information, confirming consent, and identifying missing application details.
- Created follow-up routines for unanswered leads and pending applications, improving continuity through submission.
- Participated in manager coaching, call reviews, and compliance refreshers before annual enrollment periods.

PROJECTS

Medicare Enrollment Readiness Program | 2025

Helped prepare agents for seasonal Medicare demand through shared call reviews, CMS updates, carrier changes, and practical enrollment conversations. Focus stayed on accurate guidance and client confidence.

Carrier Comparison Resource Workflow | 2024

Organized carrier information into a practical consultation reference, helping agents connect client needs, plan details, provider considerations, and prescription questions during remote calls.

LEADERSHIP & AWARDS

- Top New Agent Recognition, Prairie Oak Insurance Group, 2021
- Client Service Quality Award, Harborline Health Markets, 2023
- Enrollment Season Performance Recognition, Lakeshore Benefit Advisors, 2025
- Peer Coach, Lakeshore Benefit Advisors Agent Development Sessions, 2025 - Present

EDUCATION

High School Diploma

Racine Unified School District | GPA: 4.0 | 2019 | Racine, WI

Coursework: *Health education, communication, mathematics, business fundamentals*

CERTIFICATIONS

- Wisconsin Health Insurance License | 2021
- Medicare Annual Compliance and Certification Training | 2021
- CMS Medicare Marketing and Enrollment Compliance Training | 2021

TECHNICAL SKILLS

- **Medicare Programs:** Medicare, Medicare Advantage, Medicare Supplement
- **CMS Compliance:** CMS rules, Medicare marketing, enrollment compliance
- **Health Insurance Licensing:** Wisconsin license, state requirements, licensure compliance
- **Carrier Operations:** Carrier comparisons, plan availability, carrier relationships
- **Enrollment Systems:** Applications, enrollment windows, submission workflows
- **Sales Operations:** Inbound leads, lead conversion, sales goals
- **Client Consultation:** Needs discovery, plan education, benefit explanations
- **Documentation Quality:** Consent records, required disclosures, audit readiness
- **Performance Tracking:** Contact rates, appointments, applications
- **Remote Work Tools:** Remote sales, captive-agent operations, home office
- **Quality Management:** Call calibration, quality reviews, coaching

- **Customer Service:** Client follow-up, service recovery, relationship management

PROFESSIONAL AFFILIATIONS

- Medicare Enrollment Readiness Discussion Group, Harborline Health Markets, 2023 - 2024
- Wisconsin Insurance Professionals Networking Volunteer, 2022 - Present
- Lakeshore Benefit Advisors Agent Development Sessions, Peer Coach, 2025 - Present

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST