

STRENGTHS

- Needs-based guidance**
During discovery calls, translated protection priorities into clear options; clients gained confidence before choosing benefit programs.
- Virtual communication**
Used video meetings and concise explanations for remote clients. Managers recognized presentations as clear, calm, and easy to follow.
- Lead follow-up**
Worked provided lead queues with steady outreach and reminders; structured follow-up kept consultations moving without pressure.
- Enrollment support**
Checked application details with clients and clarified next steps. A careful handoff reduced confusion during online enrollment.
- Renewal relationships**
Stayed connected after enrollment through coverage check-ins and renewal reminders; clients received responsive support beyond the initial sale.

SKILLS

- Insurance Sales
- Benefit Presentations
- Lead Follow-Up
- Virtual Client Meetings
- Client Relationship Management
- Enrollment Support
- Renewal Conversations
- Consultative Selling
- Verbal Communication
- Video Conferencing
- CRM Documentation

SUMMARY

Insurance sales representative with four years guiding individuals and families through benefit selection, enrollment, and renewal conversations in **remote** settings. Licensed Illinois Life and Health Insurance Producer who turns **provided leads** into virtual client meetings through clear outreach, thoughtful discovery, and professional follow-up. Presents **benefit programs** in plain language, completes electronic applications, documents client interactions, and supports relationships after enrollment. Partners with managers on activity goals, performance reviews, licensing, product training, and consultative selling development. Recognized for approachable service, organized follow-through, and dependable virtual presentations. Ready to support **Pioneer Harbor Benefits** by helping more clients choose protection solutions, strengthening retention through renewal care, and contributing to a collaborative team that values coaching, advancement, and meaningful guidance for individuals and families.

EXPERIENCE

Remote Insurance Sales Representative

Northstar Coverage Group

May 2024 - Present

Rockford, IL

Owns remote lead conversion, virtual benefit presentations, electronic enrollment, renewal care, and manager-led **performance** planning for individuals and families.

- Converted provided household **leads** into virtual consultations through structured outreach and value-focused messaging
- Presented **benefit programs** through video meetings, clarifying coverage features and enrollment steps
- Completed electronic applications with accurate client information and carrier documentation
- Maintained post-**enrollment** relationships through renewal reminders and timely benefit responses
- Reviewed activity and renewal indicators with managers, refining goals and follow-up priorities
- Earned **recognition** for clear virtual presentations and dependable follow-through during licensing training

Insurance Sales Associate

Lakeside Mutual Benefits

May 2022 - April 2024

Elgin, IL

Managed qualified lead queues, discovery conversations, virtual scheduling, enrollment support, CRM records, and relationship follow-up within a **coached** insurance sales team.

- Managed qualified leads through phone, email, and video scheduling tools for sales consultations
- Conducted discovery conversations that identified protection priorities for individuals and families
- Supported online enrollment by explaining fields and confirming required information
- Recorded contact history, outcomes, follow-up dates, and renewal opportunities in CRM systems
- Built client trust through responsive communication and plain-language benefit explanations
- Completed coaching in consultative **sales**, virtual presentations, computer systems, and insurance fundamentals

PROJECTS

Virtual Benefits Enrollment Workflow 2024

Created a structured client workflow connecting lead outreach, virtual meetings, electronic applications, documentation, follow-up, and renewal reminders.

Client Renewal Conversation Program 2023

Built a practical renewal conversation approach that helped organize coverage check-ins, answer service questions, and preserve client relationships.

Electronic Applications

Basic Computer Skills

Goal Tracking

Remote Collaboration

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Remote Insurance Sales Representative at Northstar Coverage Group (2.3 Years)

● Insurance Sales Associate at Lakeside Mutual Benefits (1.9 Years)

LEADERSHIP & AWARDS

- New Producer Achievement Award, Lakeside Mutual Benefits, 2024
- Quarterly Client Care Recognition, Lakeside Mutual Benefits, 2023
- Dean's List, Waubensee Community College, 2021

EDUCATION

Associate of Applied Science in Business Administration

Waubensee Community College 🎓 GPA: 3.5 📅 2022 📍 Sugar Grove, IL

Coursework: Business communication, sales management, customer service, business technology

CERTIFICATIONS

- Illinois Life and Health Insurance Producer License 📅 2024
- Remote Sales Foundations Certificate, Coursera 📅 2023

TECHNICAL SKILLS

- **Insurance Products:** Life insurance, Health insurance, Benefit programs
- **Sales Platforms:** CRM systems, Lead queues, Sales pipelines
- **Communication Tools:** Phone, Email, Video meetings
- **Enrollment Systems:** Electronic applications, Online enrollment, Digital forms
- **Office Technology:** Laptop, Desktop computer, Working camera
- **Client Documentation:** Contact history, Meeting outcomes, Follow-up dates
- **Sales Methods:** Needs discovery, Consultative selling, Value-focused messaging
- **Renewal Management:** Renewal reminders, Coverage check-ins, Client retention
- **Performance Tracking:** Activity goals, Appointment tracking, Conversion indicators
- **Training Areas:** Product training, Licensing training, Compliance training

PROFESSIONAL AFFILIATIONS

- Peer Mentor, Waubensee Business Student Association, 2021 - 2022
- Volunteer Enrollment Guide, Fox Valley Community Resource Fair, 2023 - 2024

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST