

Emily Green

Life Insurance Agent

CONTACT

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✉️ emily.green@email.com

📍 Denver, CO

EDUCATION

Bachelor of Science in Business Administration

University of Colorado Boulder |
Boulder, CO | 2017

Certifications

- Life and Health Insurance License | State of Colorado | Issued: 2019
- FINRA Series 6 License | FINRA | Issued: 2020
- Certified Financial Planner (CFP) | Certified Financial Planner Board of Standards | Issued: 2023
- Chartered Life Underwriter (CLU) | The American College of Financial Services | Issued: 2022

LANGUAGES

- Fluent in Spanish, providing an ability to serve a diverse clientele.



PROFESSIONAL SUMMARY

Dynamic and client-focused life insurance agent with experience providing tailored insurance solutions. Proven expertise in building strong relationships and delivering personalized service, committed to helping clients protect their financial futures.



EXPERIENCE

Life Insurance Agent

2019 - Now

New York Life Insurance Company, Denver, CO

- Successfully develop and tailor life insurance policies for more than 200 clients, which contributed to a 20% increase in overall sales for the agency.
- Conduct comprehensive financial assessments for clients, recommending appropriate policies based on their financial goals, life stages, and risk tolerance.
- Build and maintain a loyal client base by providing consistent support, resulting in a retention rate of over 90% for new policyholders.
- Facilitate claims processing and policy renewals, ensuring smooth and prompt services, leading to high customer satisfaction and long-term relationships.

Sales Agent

2017 - 2019

State Farm, Denver, CO

- Focused on selling life insurance policies and exceeded sales goals, contributing to a 25% growth in the branch's sales within the first year.
- Initiated and nurtured client relationships through targeted cold calling and marketing outreach, effectively generating a consistent lead pipeline.
- Provided clients with clear information regarding policy options, benefits, and potential risks, ensuring informed decision-making.
- Managed all aspects of the claims process for clients, ensuring transparency and efficiency, while also maintaining strict adherence to regulatory standards.



SKILLS

Expertise in life insurance policies



Risk assessment and financial planning



Relationship building and client retention



Sales strategy and cold calling



CRM software proficiency

