

PROFESSIONAL SUMMARY

Health and life insurance agent with comprehensive knowledge of both medical and life insurance products. Experience in delivering tailored insurance solutions that protect clients' health and financial wellbeing. Focused on customer satisfaction and compliance with industry regulations.

EDUCATION

Bachelor of Arts in Economics

DePaul University | Chicago, IL | 2016

Certifications

- Health and Life Insurance License | State of Illinois | Issued: 2016
- Certified Health Insurance Specialist (CHIS) | 2019
- Certified Financial Planner (CFP) | Certified Financial Planner Board of Standards | Issued: 2022
- Chartered Life Underwriter (CLU) | The American College of Financial Services | Issued: 2021

SKILLS

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|---|--------|
| Expertise in health and life insurance products | Expert |
| Sales and client acquisition strategies | Expert |
| Risk evaluation and needs analysis | Expert |
| Medicare and Medicaid knowledge | Expert |
| Claims management and dispute resolution | Expert |
| Customer service and relationship management | Expert |
| Regulatory compliance and industry knowledge | Expert |
| Time management and organizational skills | Expert |

EXPERIENCE

2020 - Now

Health and Life Insurance Agent

Blue Cross Blue Shield of Illinois / Chicago, IL

- Specialize in providing both health and life insurance policies, offering clients complete protection for their medical and financial needs.
- Help clients navigate the insurance marketplace, offering guidance on coverage options and benefits for health, life, and supplemental policies.
- Conduct in-depth consultations to assess client needs and ensure that the coverage selected aligns with their financial goals and health requirements.
- Achieved 110% of annual sales goals for two consecutive years, contributing to increased market share for the region.

2016 - 2020

Insurance Agent

The Hartford / Chicago, IL

- Focused on the sale of health insurance policies, while also managing client accounts for life insurance coverage.
- Worked closely with clients to understand their insurance needs and provided tailored solutions for both health and life insurance.
- Organized client seminars to increase awareness about the importance of having adequate coverage in both areas, increasing client acquisition by 20%.
- Managed over 500 accounts, ensuring accurate policy details and high client retention rates through excellent service and communication.

ADDITIONAL INFORMATION

Volunteer with local community organizations to provide free financial planning advice to low-income families.