

Jacqueline Tracy Jacqueline Tracy

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Highly motivated, results-focused individual with extensive experience and accomplishments with over 10 years of experience as a financial representative and insurance sales professional in an inbound call center and face to face with proven results by delivering tailored service and products, resolution of client issues and closes on sales presentations to a diversified client base.

Work Experience

Licensed Sales Agent

Itelbpo - Tolleson, AZ
December 2017 to Present

Answering inbound calls demonstrating product knowledge of auto insurance and

Cross sell products associated with insurance coverage. Generated new insurance quotes and provide a policy that meets the customers needs and satisfaction while building customer relationships, earning their loyalty and trust. Smiling as I spoke with my customer

while working from your home.

Insurance Sales Advisor

Tracy Financial Services - Phoenix, AZ
October 2008 to February 2019

Customize Life Insurance to suit customers with various life insurance companies. Call on customers to deliver and explain policies. Seek out new customers and develop clientele by networking to find new customers and generated a list of prospective clients. Explain features, advantage, and disadvantages of various policies to promote sale of insurance plans. Sold Final Expense Policies and some with Long Term Care and Critical Illness.

Medicare Sales Advisor Answer

Get Insured/Vimo Inc - Phoenix, AZ
September 2016 to December 2017

inbound calls and make permission based outbound calls to highly qualified customers to educate and enroll clients on the very best Medicare plans available in the market. Consult, fact-find, recommend, address concerns and enroll to meet the customer's needs. Use proven probing techniques to qualify clients. Explain

features, advantage, and disadvantages of various policies to promote sale of Medicare plans.

Inside Sales Representative Initiate

Cardinal Health - Phoenix, AZ

November 2015 to May 2016

quality introductory customer calls with the objective of developing a long-term business relationship. Effectively negotiate and collaborate with customer and colleagues to influence support for mutually beneficial outcomes. Maximize customer relationships through timely routine contact with both new and existing customers to build and sustain trust to ensure customer satisfaction and loyalty. Navigate through the order entry systems, processes and procedures by following appropriate sales presentation guidelines.

Connexions/Optum Services Inc - Phoenix, AZ

August 2013 to September 2015

Medicare Sales Specialist Received incoming calls for the senior population to sell and promote Medicare products. Execute excellent communication, interpersonal, time management and organizational skills. Using my knowledge of the Medicare product portfolio to accurately assess the distinct needs of different prospects, explain the differences between various products. Answer questions and provide options while serving as a consultant to help the callers select the right plan for their situation and budget. Assisting with the completion of the enrollment application over the phone with complete, accurate and required information, consistent with Medicare requirements and enrollment guideline.

Consumer Loan Advisory Group Inc - Las Vegas, NV

January 2008 to October 2008

Reviewed the debt of former clients/consumers and analyzed their unsecured debt to see if they fit our program. Developed a viable and specific debt resolution plan for the consumer. Filled out the necessary forms, collected checks, followed up with the debt negotiator if necessary. Enrolled fully informed clients with reasonable expectations into the debt settlement program. Saving my clients from an ensuing bankruptcy and have them completely debt free in most cases from 36 to 48 months with their accounts paid in full! While assisting those that qualified with a loan modification with their bank or financial institution.

Insurance Associates, LLC - Scottsdale, AZ

December 2005 to January 2008

Insurance Representative The leading health and life insurance company on the internet. Called Real Time Internet Leads and Quoted and Sold Insurance to fit the customers needs. Followed up with underwriting and called doctors offices in order to get paperwork completed and submitted applications online. Kept daily log book of all leads received.

Loan Officer One

Mortgage Pro USA - Glendale, AZ

August 2005 to November 2006

of the leading Mortgage Bankers in the Southwest where I originate mortgages for home purchases, refinance, and new home construction. Solidify contacts with local realtors, contractors, financial advisors, and other referral sources and meet all potential borrowers, and inspect all properties for requested financing. Review and analyze loan transaction packages for preliminary approval or denial in accordance with bank guidelines. Assemble all required documentation for processing and underwriting on each transaction.

Education

High School Diploma

Central High School US-Arizona - Phoenix, AZ
June 1986

Skills

Health Insurance, Life Insurance, Medicare, Auto Insurance

Certifications/Licenses

Life and Health Insurance

Property and Casualty License