Stephanie Willing

Charleston, SC | 843-614-7337 | stephmwilling@gmail.com

REAL ESTATE TRANSACTION COORDINATION/PERSONAL AND COMMERCIAL LINES ACCOUNT MANAGER

An experienced and client-focused Personal and Commercial Lines Account Leader with a strong background in managing and servicing personal and commercial insurance accounts, including: auto, home, umbrella, and flood as well as Commercial Package Policies, General Liability for businesses, and Student Accident Policies for commercial lines. Leverage deep experience in building and maintaining client relationships, assessing insurance needs, and providing tailored policy recommendations to ensure comprehensive coverage and customer satisfaction. My most recent experience is in Real Estate Transaction Coordination, working with agents and their clients to ensure a smooth closing process.

CORE COMPETENCIES

Client Relationship Management | Personal Insurance Products (Auto, Home, Umbrella) | Cross-Selling

Upselling Strategies | Policy Renewals & Retention | Needs Assessment & Customized Coverage

Real Estate License | P&C License | Administrative Support | High Attention to Detail

PROFESSIONAL EXPERIENCE

First Class Coordinators 5/25 - Present

Work with assigned agents to take them through the real estate buying/selling process. I take over once the agent goes under contract, making sure they stay in compliance with all the paperwork from contract to post close.

Block Insurance, A Division of Afore Insurance Services | Commercial Lines Account Manager 01/25 - 04/25

Managed a book of commercial accounts that included childcare and martial arts studios. Responsible for keeping up with renewals, putting together proposals and upselling and quoting additional coverages.

Policygenius | Case Management Associate 08/2023 – 10/2024

Build a portfolio of quotes based on each individuals specific coverage needs. Collaborate with Agents to find solutions to help clients find the best carrier and policies for their needs.

Roseberry Insurance Agency | Independent Insurance Agent 08/2022 – 08/2023

Realtor and Lender Focused Licensed Insurance Agent. Worked with clients to find the best coverage for their needs prior to closing on a home.

EDUCATION & CREDENTIALS

Certificate of Completion – Real Estate School of South Carolina

Associate of Science (AS), Sound Engineering/Recording Arts – Full Sail University