

Christian Barrera

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PROFESSIONAL SUMMARY

Client-focused financial services professional with hands-on experience conducting needs-based consultations, managing diverse client portfolios, and building long-term relationships across income levels. Proven track record in CRM pipeline management, financial needs assessment, and solutions-oriented communication. Seeking to bring consultative sales expertise and a strong client service foundation to a relationship banking or retail banking role.

EDUCATION

Saint Xavier University

Bachelor of Business Administration, Finance.

Present

Moraine Valley Community College

2025

Oak Lawn Community High School

High School Diploma.

2022

EXPERIENCE

Life Insurance Agent

December 2025 – Present

Harborstone Financial

- Conduct client consultations with individuals across income levels, including fixed-income (SSI, disability) and higher net worth clients, tailoring coverage solutions to each client's financial situation
- Analyze client financial needs to recommend appropriate products, balancing affordability with coverage goals
- Build long-term client relationships through education, transparency, and consistent follow-up, improving trust and policy retention
- Manage a diverse client base, adapting communication and consultation strategies to varied financial backgrounds
- Utilize CRM systems to track client interactions, manage pipeline activity, and maintain organized records for ongoing service

Life Insurance Agent

May 2025 – December 2025

Family First Life

- Conducted structured client consultations to assess financial coverage needs and match appropriate products
- Built and maintained client relationships through consistent follow-up, improving policy placement and retention rates
- Utilized CRM systems to track lead activity, manage pipeline, and optimize conversion efficiency
- Achieved weekly sales targets by effectively handling objections and guiding clients through the decision-making process
- Managed high-volume outbound call activity targeting veteran-exclusive lead pools

Certified Nursing Assistant

2022 – 2024

Northwestern Medicine Palos Hospital

- Assisted patients with daily activities and completed vitals monitoring on a cardiac floor
- Collaborated with nurses to provide holistic, patient-centered care
- Charted patient care using Epic systems

SKILLS

Core Skills: Client Relationship Management and Retention, CRM Systems and Pipeline Management, Financial Needs Assessment and Risk Awareness, Needs-Based Consulting and Solution Selling, Budget-Conscious Planning, Compliance-Focused Documentation and Client Records, Data Tracking and Metrics Analysis

CERTIFICATIONS

- Life Insurance License
- CFI: Careers in Finance
- Microsoft Learn: Excel Data Analysis Modules
- CPR Certification