**JOHRINE B. NALDO**

Unit 1828 Central Park Condominium 168 D. Jorge St., Pasay City

09057332590

jahrinenaldo@gmail.com

**PROFESSIONAL SUMMARY**

With over 10 years of experience specializing in Real Estate and Secretarial in terms of Sales, Documentation of Life Insurance policies and basic Tax return filing.

**WORK EXPERIENCE**

**Company:** Sun Life of Canada Phils. Inc. (Crimson Queen NBO)

**Date:** October 2015- Current

**POSITION: Documentation Officer**

**DUTIES AND RESPONSIBILITIES:**

* Manage the daily/weekly/monthly agenda and arrange new meetings and appointments to potential client.
* Prepare investment proposals prior to client meeting based on their target returns.
* Communicates with hospitals and laboratories to make sure all submitted medical reports and results are updated for transparent underwriting of applied insurance.
* Constant follow-ups with Underwriting department in ensuring the current new business are in place and approved within the time frame.
* Interacts with the clients for establishing after sales relationships, possible for repeat sales and referrals.
* Ensures updating and posting of daily remittances and bank to bank payments.
* Prepares periodic reports of activities, including summaries for weekly, monthly and quarterly reports to ensures targets are aligned with overall financial goal.
* Reviews/Sends Reminder Letters to delinquent client, placing direct phone calls and E-mails when necessary, to avoid lapsed policies.
* Maintains important documentation to valued clients and keep them updated about their portfolio.
* Filing and Enrollment of new recruits to Insurance Commission examinations.
* Collaborates with Licensing Department for the contract of new recruits.
* Implements policies and procedures based on the Company's Code of Discipline.
* Documentation and Filing of basic Tax Returns.

**Company:** New San Jose Builders Inc.

**Date:** June 2013- September 2015

**POSITION: Property Consultant** (Universal Sales Group)

**DUTIES AND RESPONSIBILITIES:**

* Generate client leads to buy, sell and rent property.
* Counsel clients on market conditions and prices.
* Show properties to potential buyers and renters.
* Facilitate negotiations to buyers and sellers
* Review purchase contracts to ensure terms are met
* Prepare contracts, agreements and other documents for each real estate transactions
* Attend seminars to maintain remain knowledgeable.

**SKILLS/SPECIAL ABILITIES**

* Introduced to Basic Tax Return Filing
* Proficient in Microsoft Excel, Word and Power Point
* Good Customer Service Skills

**TRAININGS & SEMINAR**

Job Application: Preparations and Tips-2020

Continuing Professional Development-2015

**SHOLASTIC RECORD**

**Bachelor of Science in Office Administration**

Metro Business College

Year 2016-Present

**REFERENCES**

|  |  |
| --- | --- |
| Name: | Ms. Analyn A. Pineda |
| Mobile/Email: | 0918900905 | |
| Position: | New Business Manager | |
| Company: | Sun Life of Canada Phils. Inc. (Crimson Queen NBO) | |

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| --- | --- | --- | --- | --- |
| Name: | Ms. Marie Antoinette G. Lozada |  | Ms. Rinalyn L. Papa | |
| Mobile/Email: | 09175777677 |  | 09175387246 | |
| Position: | Unit Manager |  | Unit Manager | |
| Company: | SLOCPI |  | SLOCPI |