Related professional experience

**Cruises and Tours Unlimited**

Host Travel Agency

Travel Agent - Independent Contractor

**(February 2015, Current)**

* Actively listen to client needs, desires and concerns to customize travel options
* Book Domestic and International Air, Hotel, Car, Vacation/Tour Packages, Activities, Travel Insurance
* Price forecasting and budgeting
* Upselling - suggesting upgrades and add-ons (i.e. travel insurance)
* Research cultural, social, financial, geographical climate of desired destinations to best educate clients and plan itineraries
* Liaison between clients and vendors to facilitate and answer difficult questions
* Maintain CRM database, safeguarding customer information
* Marketing strategy ideation and template design

**Sun Life Financial**

Finance and Insurance Sales

Senior Quote Associate/Prospect Specialist, Prospect Center – Small Business

**(July 2012-June 2017)**

* Mastery of Quote & Policy System (QPS), Sales Automation System (SAS), and others
* Careful analysis of Requests for Proposal (RFP) and Prior Carrier Certificates to generate accurate insurance proposals
* High quality productivity within a 24-hour turn-around time
* Staying abreast of Sun Life product updates, offerings, quoting methods, and state regulations
* Maintaining knowledge of underwriting principles for risk assessment
* Collaboratively manage flow and accuracy of inventory and office operations
* Developing rapport with Brokers for ease in sales and proposal delivery
* Facilitate team meetings and trainings

**Cross Cultural Continuum**

Inclusion Network, Sun Life Financial

Cabinet, Communications

**(February 2016-Current)**

* Announcements and communications via e-mail, company bulletin, member meetings, newsletters
* Social media management (Facebook, LinkedIn, Instagram, Twitter)
* Primary e-mail inbox management/template
* Collaborative program planning, content ideation/creation
* Event planning
* Project management
* Team building and curation
* Member on-boarding, tracking
* Public relations
* Networking with internal and external partners

Education

University of Massachusetts Boston

Bachelor of Arts in Economics (June 2010)

Honors: Dean’s List, Global Leadership Certificate