

Bernard Yang

VANCOUVER, BC

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PROFILE

A **Level 2 General Insurance Salesperson** with 3 years experience in the insurance industry. A team player who is also capable of finding solutions independently. Currently working in a position assisting producers with a book of business primarily in personal lines. Seeking a challenging position with an opportunity to learn the more complex side of commercial lines.

EXPERIENCE

Customer Service Representative

May 2023 – Present

Insureline Brokers

Vancouver, BC

- Utilize computer programming knowledge to prefill 100's of questionnaires, disclosures, LOBs saving time for team members and producers
- Identify inefficiencies with checking for policy downloads, make suggestion to management to cross reference downloads in suspense with policies issued
- Process PolicyCentre renewals, out-of-province transfers, and all other incidental ICBC transactions including Family Private Auto
- Help producers get quotes via Applied Rating System, look up wording, get binding through underwriters, get quotes for hard to place policies through special market
- Use Applied Epic to enter activities, endorsements, cancellations, invoice payments, create policy shells, create CSIO applications

Real Estate Agent

July 2018 – July 2020

Macdonald Realty

Vancouver, BC

- Attended agents' open house and analyzed sales data on MLS to accurately perform comparative market analysis
- Prepared all documents pertaining to contract of purchase and sale, and listing agreements

Customer Service Representative

June 2015 – Jan 2018

Tony Lau Insurance

Vancouver, BC

- Helped in-house, walk-in clients, producers with home, travel, and ICBC insurance
 - Experience working with Applied TAM and PowerQuote
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EDUCATION

Diploma in Web Development

May 2021 – Aug 2021

Lighthouse Labs

Remote, BC

Diploma in Business Administration

2009 – 2011

Kwantlen Polytechnic University

Richmond, BC

INSURANCE TOOLKIT

- Applied Epic, Applied Rating System, Applied TAM, PowerQuote
 - Family Portal, Gore Mutual Portal (Guidewire), Intact Portal, Wawanesa Portal
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SKILLS

- Intermediate knowledge of Microsoft Excel, and Outlook
- Working knowledge of computer programming languages including Python, JavaScript, SQL
- Cantonese conversant