

# Bernard Yang

CAIB | Level 2 General Insurance Licence

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Experience	<p><b>Customer Service Representative</b></p> <p>Horizon West Insurance (Vancouver) Services - January 2024 to Present</p> <ul style="list-style-type: none"><li>Prepared commercial insurance quotes for COC, CGL, and non-standard risks, including gathering underwriting information, finding insurance markets and presenting quotes to clients and producers.</li><li>Produced certificates of liability, insurance binders, and subscription policy invoices, carefully reviewing for accuracy.</li><li>Advised clients on home, travel and private auto insurance, translating technical information to help clients make an informed decision.</li><li>Processed Policy Centre transactions, including out-of-province transfers, fleet renewals, and estate transfers.</li><li>Developed Python scripts to automate renewal letters, accounting reconciliations, and stamping ICBC policy documents, improving operational efficiency and reducing manual processing time.</li><li>Designed and built fully functional company website with CMS, Google Maps integration, and online forms, demonstrating ability to learn technical skills quickly.</li></ul>
	<p><b>Customer Service Representative</b></p> <p>InsureLine Brokers Cedar - May 2023 to January 2024</p> <ul style="list-style-type: none"><li>Assisted producers during the brokerage's first year with high-volume LOB transfers by using Python to streamline completion of questionnaires and disclosures.</li><li>Utilized Applied Epic to input policy activities, invoicing, policy shells, and CSIO applications.</li></ul>
	<p><b>Real Estate Advisor</b></p> <p>Macdonald Realty - June 2018 to June 2020</p> <ul style="list-style-type: none"><li>Handled inquiries and showing requests for clients and Realtors, ensuring clear and timely communication.</li></ul>
	<p><b>Customer Service Representative</b></p> <p>Tony Lau Insurance Agencies - June 2015 to January 2018</p> <ul style="list-style-type: none"><li>Improved existing Applied TAM templates to auto-populate fields directly from BMS, saving time for other CSR's.</li></ul>
Skills	<p><b>Insurance Systems</b></p> <p>Applied Epic, Applied Rating System, Power Broker, Power Quote, Policy Centre</p> <p><b>Programming</b></p> <p>Python (data analysis), JavaScript (front-end development)</p> <p><b>Language</b></p> <p>Conversant in Cantonese</p>
Education	<p>Kwantlen Polytechnic University</p> <p>Diploma in Business Administration</p>
Project	<p><b>ICBC E-Stamp Tool</b></p> <p><a href="https://github.com/WebDevBernard/ICBC_E-Stamp_Tool">https://github.com/WebDevBernard/ICBC_E-Stamp_Tool</a></p> <ul style="list-style-type: none"><li>Automated ICBC policy document preparation for email consent via a single-click Python script, which applies the digital validation stamp, separates customer copies, organizes and renames backups, and archives files older than one year.</li></ul>