Bernard Yang

CAIB

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Experience

Customer Service Representative
Horizon West Insurance (Vancouver) Services - January 2024 to Present

- Developed fully functional company website using responsive web design; featuring an admin panel (CMS), Google Maps integration, and email-enabled web forms.
- Supported small commercial accounts and assisted with marketing personal lines to standard and non-standard markets.
- Processed Policy Centre transactions, including out-of-province transfers, fleet renewals, and estate transfers; prepared insurance binders and certificates of liability.
- Created Python scripts to automate renewal letters, accounting reconciliations, and ICBC policy documents, replacing previously manual processes.
- Provided technology support to staff, including email troubleshooting, and general IT issues.

Customer Service Representative
InsureLine Brokers Cedar - May 2023 to January 2024

- Assisted producers during the brokerage's first year with high-volume LOB transfers by using Python to streamline completion of questionnaires and disclosures.
- Utilized Applied Epic to manage policy activities, process invoice payments, create policy shells, and complete CSIO applications.

Real Estate Advisor
Macdonald Realty - June 2018 to June 2020

- Handled inquiries and showing requests for clients and Realtors, ensuring clear and timely communication.

Customer Service Representative
Tony Lau Insurance Agencies - June 2015 to January 2018

- Improved exisiting Applied TAM templates to auto-populate fields directly from BMS.

Project

ICBC E-Stamp Tool
https://github.com/WebDevBernard/ICBC_E-Stamp_Tool

- Python script to prepare ICBC policy documents for email consent, all in a single click: applies the digital validation stamp, separates customer copies, organizes and renames backups, and archives files older than one year.

Skills

Insurance Systems:
Policy Centre, Applied Epic, Applied Rating System, Power Broker, Power Quote

Programming:
Python (data analysis & PDF manipulation), JavaScript (front-end development)

Language:
Conversant in Cantonese

Education

Kwantlen Polytechnic University
Diploma in Business Administration