

Bernard Yang

CAIB | Level 2 General Insurance Licence

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Experience

Customer Service Representative	January 2024 to Present
Horizon West Insurance (Vancouver) Services	
Commercial Lines Experience	
<ul style="list-style-type: none">Put together commercial insurance quotes, including gathering underwriting information, helping clients fill out applications, submitting to insurance markets, and presenting quotes to clients and producers for COC and CGL.Prepared certificate of insurance, insurance binders, and subscription policy invoices for producers, carefully reviewing for accuracy.	
Personal Lines Experience	
<ul style="list-style-type: none">Supported producers in marketing insurance, invoicing, submitting new business, processing endorsements, and reviewing policy wordings.Advised clients on home, travel and ICBC / private auto insurance, translating technical information to help clients make an informed decision.	
Technical Experience	
<ul style="list-style-type: none">Developed Python scripts to automate renewal letters, accounting reconciliations, and stamping ICBC policy documents, improving operational efficiency and reducing manual processing time.Designed and built fully functional company website with CMS, Google Maps integration, and online forms, demonstrating ability to learn technical skills quickly.	
Customer Service Representative	May 2023 to January 2024
InsureLine Brokers Cedar	
<ul style="list-style-type: none">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 input policy activities, invoicing, policy shells, and CSIO applications.	
Real Estate Advisor	June 2018 to June 2020
Macdonald Realty	
<ul style="list-style-type: none">Handled inquiries and showing requests for clients and Realtors, ensuring clear and timely communication.	
Customer Service Representative	June 2015 to January 2018
Tony Lau Insurance Agencies	
<ul style="list-style-type: none">Improved existing Applied TAM templates to auto-populate fields directly from BMS, saving time for other CSR's.	

Skills

Insurance Systems	
Applied Epic, Applied Rating System, Power Broker, Power Quote, Policy Centre	
Programming	
Python (data analysis), JavaScript (front-end development)	
Language	
Conversant in Cantonese	

Education

Canadian Accredited Insurance Broker (CAIB)
Insurance Brokers Association of Canada
Diploma in Business Administration
Kwantlen Polytechnic University

Project

ICBC E-Stamp Tool
https://github.com/WebDevBernard/ICBC_E-Stamp_Tool
<ul style="list-style-type: none">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.