Bernard Yang

CAIB | Level 2 General Insurance Licence

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Experience

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

- 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.
- Produced certificates of liability, insurance binders, and subscription policy invoices, carefully reviewing for accuracy.
- Advised clients on home, travel and private auto insurance, translating technical information to help clients make an informed decision.
- Processed Policy Centre transactions, including out-of-province transfers, fleet renewals, and estate transfers.
- 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
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 input policy activities, invoicing, policy shells, and 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, 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

Kwantlen Polytechnic University
Diploma in Business Administration

Project

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

- 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.