

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

- 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

- 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

- 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

- 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

- 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

- 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

- 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.