

Bernard Yang

CAIB | Level 2 General Insurance Licence

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Experience	<p>Customer Service Representative Horizon West Insurance (Vancouver) Services - January 2024 to Present</p> <p><u>Commercial Lines Experience</u></p> <ul style="list-style-type: none">Put together commercial insurance quotes for COC, CGL, and non-standard risks, including gathering underwriting information, finding insurance markets and presenting quotes to clients and producers.Prepared certificates of liability, insurance binders, and subscription policy invoices for producers, carefully reviewing for accuracy. <p><u>Personal Lines Experience</u></p> <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. <p><u>Technical Experience</u></p> <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. <p>Customer Service Representative InsureLine Brokers Cedar - May 2023 to January 2024</p> <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. <p>Real Estate Advisor Macdonald Realty - June 2018 to June 2020</p> <ul style="list-style-type: none">Handled inquiries and showing requests for clients and Realtors, ensuring clear and timely communication. <p>Customer Service Representative Tony Lau Insurance Agencies - June 2015 to January 2018</p> <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	<p>Insurance Systems Applied Epic, Applied Rating System, Power Broker, Power Quote, Policy Centre</p> <p>Programming Python (data analysis), JavaScript (front-end development)</p> <p>Language Conversant in Cantonese</p>
Education	<p>Canadian Accredited Insurance Broker (CAIB) Insurance Brokers Association of Canada</p> <p>Diploma in Business Administration Kwantlen Polytechnic University</p>
Project	<p>ICBC E-Stamp Tool https://github.com/WebDevBernard/ICBC_E-Stamp_Tool</p> <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.