# WENBO NI RESUME

Toronto, Canada | Phone: 6473766703 | Email: wenboni@yahoo.com

## HIGHLIGHTS

- High level of familiarity with casualty insurance operations and fiduciary procedures (worked as quality assurance analyst, binder review assistant, and on major invoicing projects).
- Worked in conjunction with financial planning team to provide support throughout external auditing procedures by supplying documentation used to justify large-scale revenue bookings.
- Communicated/educated Quality Assurance Protocols set by fiduciary team to client facing colleagues in order to streamline the procedure (i.e to ensure supporting documentation be submitted accurately as well as in an efficient manner.
- Assisted Public Entities department in rescuing $2.5M from audit department's holding account i.e. helped obtain supporting documentation necessary for recognizing revenue based on binder review team's revised guidelines and protocols.
- Designed/built model using Excel macros to conduct data entry audit on invoicing team - model pulls data from Cansys to compare with data entered into IRT to identify discrepancies.
- Conducted Central Intake (CIT) reporting i.e. productivity reporting pertaining to SLA targets to senior leadership by abstracting data from CIT system and downloading onto Excel Spreadsheet – then providing summary of highlights in email format

---

## EDUCATION

**2013 to 2018** **Wilfrid Laurier University** (Waterloo, Canada)

**Degree:** Bachelor of Business Administration (Honors)
**Area of Focus:** Finance
**Minors:** Financial Math and Economics

---

## EXPERIENCES

**Dec 2018 to Present** **Marsh Canada Inc – CSS Operations** (Toronto, ON)

**Quality Assurance Analyst / Binder Review Team**

- Ensured that internal controls of revenue recognition protocols were met (i.e. ensured that client and carrier supporting documentation/written agreements matched what was being booked)
- Back-checked whether client service team followed internal process guidelines and compliance protocols as part of an internal auditing procedure (ensured that CBIs were drafted for all placements)
- Worked with US Compliance team a.k.a binder review team to ensure all required documents were in place in order for revenue to be recognized as the QA processed went to the US side
- Ensured that client and carrier confirmation of premiums, commission, coverage code, policy terms and entity name shown on IRT requests had been obtained by client team in an explicit and clear manner prior to passing of request to invoicing team
- Discovered discrepancies in supporting docs and billing details and advised client facing colleagues how to amend accordingly
- Advised senior leadership team on status of outstanding revenue and what documents are missing
- Worked on advanced invoicing requests for exception list clients, conducted CIT reporting to senior management team, processed invoice loaders, provided Binder Review assistance training to other Marsh Colleagues

**June 2018 to Sept 2018** **Scotiabank RSC – RDITS – Estate Planning** (Mississauga, ON)

**Accounting Officer**

- Communicated with customers via email and telephone to understand their estate planning needs and objectives. Developed concise action plans based on this information to ensure their goals are met
- Prepared estate worksheets, withdrawal forms and reinstatement instructions for processing by other colleagues
- Reviewed wills, declaration forms, letters of direction, probate, vetter notes and communicated with financial advisors from branches all across Canada to obtain disbursement instructions
- Completed tax forms manually (i.e. T4A, RC249, RC240, 60L, T2019, estate tax letters) and ensured that the correct tax slip is disbursed based on product and settlement classifications (i.e. joint, sole, registered, non-registered, investment plans, RIFS, LIFS, TFSA, RRSP, RDSP)

**June 2017 to Apr 2018** **Apple (Canada)** (Waterloo, ON)

**Order Support Specialist**

- Provided resolution and settlement to multitude of logistic and carrier related issues that emerges as a result of changing customer preferences (e.g. deal with implication for change in payment method)
- Proposed recommendations and product suggestions to prospective clients based on their business' needs (i.e. find the most compatible IT solution for a specific digital business model, determine the right software service to prevent customer transactions that carry substantial risk, identify fitting sector- specific solutions for preventing fraud, etc)
- Performed fraud/background checks on customers
- Recognized opportunities to up-sell certain features, software packages, and service upgrades through explanation of how it will lead to improvements in business performance and description of technical detail

---

## EXTRACURRICULARS

**Nov 2021 to May 22** **Junior Achievement Canada**

**Program Advisor/Administrator**

- Lead team of 15 highschool students across Canada in process of creating, administering, and liquidating an online business
- Delivered business related curriculum/material to students on how to run an engaging business on e-commerce platforms
- Selected executive leadership team amongst students and delegated duties accordingly
- Students came up with idea of career development seminars in which successful professionals were invited to deliver career advice to current high school students (who paid to attend the seminar)

---

## ACCOMPLISHMENTS

**Revenue Recognition Standout (Q2 2020)** – Marsh Canada Inc

- Helped Public Entities dept recognize over $2.7M in outstanding revenue by advising them on how to meet compliance standards in their operating procedures

**Promotion to Binder Review Assistant (May 2020)** – Marsh Canada Inc

- Helped CR team across Canada adapt to new Binder Review protocols/requirements.

**TD Risk Management Case Competition (2015)** – University of Waterloo, ON

- Winner of case competition
- Case Question: How often do firms really refinance in today's capital management practices?