

JULI CURTIS

ADMINISTRATIVE ASSISTANT

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Phoenixville, PA 19460

(484)-919-1096
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OBJECTIVE

Dedicated and technically skilled professional with a high level of customer service and administrative support skills, which have been developed through training and years of experience as an Administrative Assistant.

KEY SKILLS

Excellent Customer Service

Insurance Carrier Site and
Internal CRM Navigation

Secure Confidential Material

Microsoft Office

- Word
- Excel
- Outlook
- PowerPoint

Personal

- Quick Learner
- Self-Motivated
- Positive Attitude
- Analytical, Attention to Detail
- Independent and Team-Oriented

EXPERIENCE

Feb 2020 – April 2020

Jr. Account Executive • The Elite Group • Malvern, PA

- Provided administrative support for Account Executives.
- Gathered data for marketing of RFPs and spreadsheet options for client review.
- Assisted in marketing to prospective clients - create presentation materials and employee communication.

Oct 2006 – Dec 2019

Administrative Assistant • Kistler Tiffany Benefits • Berwyn, PA

- Provide administrative support for Sales Agents/ Benefit Consultants
- Assist with new business and renewal quotes
- Prepare presentation materials and comparison of benefits spreadsheets
- Process renewal plan changes; update employee plan selections. Update plans/rates for COBRA
- Process new group business implementation by gathering new business paperwork and scrubbing cases for completion and accuracy prior to submission to the carrier
- Communicate final carrier approval to the client, provide rate sheets and plan designs
- Process client group enrollments/ terminations through carrier portals
- Research client billing and claims issues

1988-1999

Administrative Assistant, Power & Business Services •

Snohomish Co. Public Utility Dist. • Everett, WA

- Provided administrative support for Assistant General Manager and management staff
- Heavy phone contact with internal and external customers
- Gathered data and statics for reports, Excel spreadsheets and charts
- Managed administrative contracts and tracked expenses for budgeting purposes
- Coordinated calendars and handled logistics for the scheduling of events and meetings
- Handled travel arrangements and processed expense reports
- Quoted fees and calculated refunds for primary line extensions

REFERENCES

Available upon request