**Rachel RoopnarineSingh.**

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**Education**

* **Trinidad and Tobago Association of Insurance and Financial Advisors.**
* ACS Customer Service Training (2014)
* LOMA 290- Insurance Company Operations. (2013)
* LOMA 280- Introduction to Insurance Operations. (2011)
* FLMI (Part 1) Completed (2013)
* **School of Business and Computer Science.**
* Introduction of Supervisory Management. (2011)
* **University of London** (2005-2008)
* **Bachelor of Science. Business. (Honors)**
* **Caribbean Examinations Council (CXC):**
* **Mathematics: 2**
* **English-A: 1**
* **Biology:2**
* **Chemistry:3**
* **Spanish:3**
* **Geography:3**
* **Principles of Accounts:2**
* **Principles of Business**
* **A-Levels- Accounting and Business** ( 2005)

**Work Experience:**

* **Executive Administrative Assistant Marcia Wong ( Jun.2015 – Oct.2015), Jan 2017-Present**
* Handled all administrative duties and contacting clients daily.
* Developed and maintained a filing system.
* Updated and maintained office policies and procedures.
* Point of contact for internal and external clients for insurance purposes.
* **Sales Representative Guardian Life of the Caribbean Ltd. ( Nov.2015 – Dec 2016)**
* Obtained client sources using referrals, occupation and same risk interests to compile a list of prospects for both life and general insurance.
* Determined clients’ needs and financial situations by determining extent of present coverage, investments and ascertaining long-term goals.
* Developed a coordinated protection plan and solution for clients by calculating and quoting rates for immediate coverage action and long-term strategy implantation.
* Provided continuous service by providing direct deposit forms, collecting premiums and processing any changes in beneficiary and policy applications.
* **Health Claims Assistant Guardian Life of the Caribbean Ltd. (Mar.2015- June 2015)**
* Prepared supporting documentation for claims managers for claim evaluation and reporting.
* Completed Health Claims Processes and Procedures Training.
* Provided correspondence to internal and external customers.
* Liaised with service providers and brokers to support effective claim management.
* Assisted with auditing and reviewing of internal and external claim files.
* Provided professional client service and built positive relations with brokers and customers.
* **Premium Accounting Assistant**  **Guardian Life of the Caribbean Ltd. (Sept. 2008-Jan.2015)**
  + Accounting through groups payments, reconciliation and application of premiums for companies.
  + Monitored procedures and updated reports daily to ensure timely processing of premiums.
  + Researched, reconciled and cleared suspense and disbursements accounts.
  + Avidly engaged with new and existing clients with queries and solutions on insurance portfolios.
  + Ensured accurate and timely application of premiums through quality checks.
  + Supervised, trained and counseled new employees on department processes and procedure.

**Skills**

* All Microsoft Applications- Microsoft Word, Excel, Power Point
* Mocha Soft As 400 Ingenium
* Capsil
* Plexis
* Work flow Station and Oracle Applications.

**References**

* Ms. Neisha Parmanand ANSA Mcal 868-368-3834
* Mr. Glen Beharry (Team Leader) Guardian Group 868-716-9744
* Ms. Ann Marie Kirk (Team Leader) Guardian Group(retired) 868-793-6845
* Ms. Marcia Wong MFA Financial Advisor (Guardian Group) 868-365-7959