**Gulfjobseeker.com CV No:** **1310238**

**Mobile +**971505905010 / +971504753686

To get contact details of this candidates

Submit request through Feedback Link

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**Objective:**

To obtain a position that would fit my qualifications, to gain comprehensive and advancement and to accumulate knowledge thus enabling me to contribute my capabilities for the success of the institution as well as my personal growth and development.

**Key Qualifications:**

* Has over 6 years providing a strong analytical skills and customer oriented with the leading insurance provider in the Philippines.
* Skilled in building and maintaining excellent relationships with superiors, team members and customers alike.
* A flexible professional who enjoys learning new skills and quickly adapts to the organizational changes.
* Exceptional command of the English language with strong written and transcription skills.

**CORE STRENGTH:**

Strong Client Interface • Operational Management • Organization Effectiveness • Marketing and Office Administration • Extensive Team Leadership and personal development skills

**Skills:**

Computer literate (MS Word, Ms Excel, Power Point, Internet Surfing, Emails)

Systems used: Oracle 6.0 CIS Life

Document Management, Customer service & Office routines (Finance & Admin)

Driving

**Additional Professional Activity**

* Life Office Management Association:
* LOMA 280 – Principles of Insurance: Life Health and Annuities
* LOMA 290 – Insurance Company Operations

**Professional Experience:**

**MILLENNIUM INSURANCE BROKERS CO. (LLC)**

**Coordinator-Life & Financial Services – Insurance Consultant**

**May 19, 2013 - Present**

* Primarily assist the sales team, focusing mostly on managing schedules and the distribution of any sales documentation.
* Follows up on any sales quotations made for clients, negotiating terms with the client at a cost best suited for them.
* To respond quickly and efficiently to all in-coming sales enquiries, by telephone, fax and email, preparing brochures as required.
* To follow up all enquiries, preparing proposals where necessary and facilitating show rounds with potential clients to show them our facilities
* Contracting bookings and raising invoices
* Responsible for coordinating life & financial services portfolio by providing exceptional support on marketing, sales and after sales services which includes renewals, claims and records keeping.
* Ensure an efficient tracking system of all event paper-work
* Co-ordinating all details for the client, renewals of policies.
* Prepares marketing reports by collecting, analyzing, and summarizing sales data.

**Philippine National Bank LIFE INSURANCE INC. - (July 2011- December 2012)**

*Traces its roots from New York Life Insurance Philippines Inc. (NYLIP) as a Philippine subsidiary of US based New York Life International LLC and commenced operations in August 2001.*

**Business Development Specialist**

* Receive and pre-screens completeness of all application for life insurance (Traditional, UL, Term, etc.) with 24 hours of submission.
* Encodes and transmits to HO electronically applications for life insurance within 24 hours submission.
* Return to FA’s incomplete improperly sold applications for life insurance and assists/guides FA’s in completing application within 24 hours of submission.
* Monitor and follow-ups with FA’s submission of additional documents and other requirements.
* Attend to all policy inquiries and related services, complaints via telephone, mail, email, text message walk-in as received/ notified.
* Controls and record all checks released to clients for policy loan, withdrawals, surrender.
* Prepares daily applications status reports.
* Ensures all telephone calls are answered promptly. Return call as promised.

**Customer Service - Individual Life Insurance**

* Coordinates with different agencies and agents for premium collections.
* Communicates with Agents , Branch Secretaries, Unit Managers, Agency Managers regarding pending requirements for new applications.
* Serves and retains customers by providing product and service information.
* Resolves product or service problems by resolving customer’s complaints.
* Uses skills to retain current customers and services by explaining features and benefits.
* Accepts incoming calls , emails and walk ins customers and answers properly to customer’s inquiries regarding individual insurance coverage.
* Lead Coordinator, responsible for managing on line leads that come into Service Desk including lead assignment , lead tracking , agent performance tracking and MIS generation.

**GREPALIFE FINANCIAL, INC. (Formerly GREAT PACIFIC LIFE ASSURANCE CORP.)**

**A YGC member - (February 2010 – 2011)**

**Customer Service Specialist**

* Process policy benefits like loans, cash surrender value, equity benefit, partial and full maturity.
* Process policy changes like names, address, birthdate, status, beneficiaries, modes, reissue of contracts, plans and sum assured.
* Processing of applications of health statement.
* Answer telephone inquiries/ follow-ups from policy holders/ associates.
* To provide quality customer service to our clients and agents in the areas of new business processing, policy service maintenance including policy changes/endorsements and reinstatements.

**GREATLIFE FINANCIAL (formerly NIPPON LIFE INSURANCE PHILIPPINES)**

**(February 2009 – 2010)**

**Policy Service Specialist**

* Monitoring of premium register (First Notice, Reminder and Lapsed Notice).
* Handling telephone inquiries from client, agent and branch office staff (BOS)
* Processing of applications for reinstatement
* Preparing and mailing of policy amendments/endorsement letter (e.g. change of billing address, payment mode change/addition of beneficiary).
* Suspense and settling of initial premium deposits.
* To provide quality customer service to our clients and agents in the areas of new business processing, policy service maintenance including premium billing, policy changes/endorsements and reinstatements.

**UNITED COCONUT PLANTERS LIFE ASSURANCE CORPORATION**

**(August 2006 – January 2009)**

**Billing Processor – HEALTHCARE DEPARTMENT**

* Checks completeness of documents (e.g. computation sheet, letter of authorization, official receipt, breakdown of computation) being utilized coming from the claims processor including attach/detach and shorting.
* Processes and releases billing by sorting documents per account, preparing billing summary & billing statement.
* Makes report for Billing Monitoring Sheet and forwarded to Department Manager
* Performs other duties as may be assigned by immediate superior.

**Shares Stock Position Keeper – FINANCE DIVISION (directly reporting to SPV)**

* Receives invoices of transactions traded daily by the Head of Finance Division from various brokers.
* Records the following data on Buying and Selling Transactions Ledgers.
* Do Settlement Instruction Request (SIR) for stocks bought and sold.
* Forward the Settlement Instruction Request Form (SIR) to approving officer for their signature then fax to Philippine Depository & Trust Corporation (PDTC).
* Accomplishes the following monthly reports for submission to Investment Accounting.
* Do monthly physical count of stocks.
* Do monthly reconciliation of stocks scheduled with Accounting.
* Maintains and controls records on purchased and sold stocks.

**Super Shopping Market Inc. (SM) (February 2006 – June 2006)**

**Position Title:** Treasury Assistant

**Specialization:** Banking/Financial Services

**Role:** Treasury Management

**Industry:** Retail/Merchandise

**Work Description:**

* In charge for preparation of loose change fund, petty cash fund, OR/PR receipt
* Monitor cash sales and foreign ex-change volume
* Daily inventory of small bills and coins
* Weekly cash ex-change for small bills and coins
* Prepare cash box
* Checks cashiers pick up
* Assist service counter and bills payment
* Monitoring stocks of the services counter

**Western Marketing (August 2005 – January 2006)**

**Position Title:** Warehouse Assistant

**Specialization:** Purchasing/Inventory/Material & Warehouse Management

**Role:** Management

**Industry:** Electrical & Electronics

**Work Description:**

* Check purchase orders, delivery receipt and invoice
* Do the weekly and monthly inventory
* Monitoring stocks of the store

**Personal Data:**

Date of birth : December 13, 1983

Nationality : Filipino

Civil status : Married

**Educational Background:**

College Colegio de San Juan de Letran

Course Bachelor of Science in Business Administration Major in Management

**Character References & Certificates:** Available upon request