



CHIARA LEI QUILAPIO

GENERAL VIRTUAL ASSISTANT

PERSONAL PROFILE

I'm an experienced virtual assistant who has worked for three financial planning firms in Australia in the course of 4 years. I also have experience in being a Real Estate Virtual Assistant. Knowledgeable in basic Microsoft Programs and Adobe Applications. Hardworking, resilient and is good at finding ways to get the job done efficiently.

HIGHLIGHTED SKILLS

- Excellent Communication Skills
- Service and Support Oriented
- Fast Learner
- Strong Work Ethic
- Great Attention to Detail
- Effective at finding better ways to do the job
- Has the flexibility to adapt to change

CONTACT INFORMATION

Cell: (+63) 917 706 2192

Email: chiaraquilapio@gmail.com

Website: chiaraquilapioejobs180.com

Address: Unit 1103, Avida Riala Tower 1, Lahug, Cebu City

WORK HISTORY

Real Estate Virtual Assistant

SPHEREROCKET - CHANNEL JUNKIES

(MAY 2022- SEPTEMBER 2022)

- Takes minutes of the meeting for every potential buyers meeting with my client
- Updating KVCORE with client details from the meeting, creating profiles for potential buyers, setting up suggested houses in the market suited to client's preferences in a home
- Creates monthly postcards and newsletters for past, present and future clients.
- Manages my client's inbox and is responsible for sending out mass emails monthly for the postcards and newsletters.

General Virtual Assistant

HYLAND FINANCIAL PLANNING

(DECEMBER 2020- APRIL 2022)

- Generates Annual Advice Agreements and product fee forms
- Manages the company's outlook inbox
- Manages DocuSign preparation of forms, sending out to clients and saving in relevant client folders
- Product Research
- Performs some lodgement tasks like withdrawal and insurance cancellations.
- Data Entry for client's details in the CRM.
- Creates task manuals for documentation of task processes
- Trains new hires with the task processes

Krutherford Corporation

CORRECTION EDITOR (OCTOBER 2020-DECEMBER 2020)

- Applies corrections/edits to a manuscript from author's instructions.

Financial Planning Assistant

ELLIOT WATSON FINANCIAL PLANNING

(JANUARY 2020- JUNE 2020)

RI WIDE BAY (JUNE 2018- DECEMBER 2019)

- Prepares necessary reports and documents for Client Appointments such as:
 - Pre and post review reports containing client information of funds, and investments and insurance and previous advice
 - Client Service Agreements
 - Authority to proceed Forms
 - Generated beneficiary forms
 - Updated Investment Trackers
- Calls fund providers to gather account information and product rundowns for clients, download Product Disclosure Statements and Fact Sheets
- Updates full fact find data entry for new and existing clients in their Xplan before and after client meeting.



CHIARA LEI QUILAPIO

VIRTUAL FINANCIAL PLANNING
ASSISTANT

PREVIOUS EDUCATION

Cebu Normal University

BA IN COMMUNICATION, 2018

Mandaue City Science High School

HIGH SCHOOL DIPLOMA, CLASS OF 2014

Mandaue City School For the Arts

PRIMARY EDUCATION, CLASS OF 2010

LANGUAGES

Fluent in:

- English
- Tagalog
- Bisaya

Has basic understanding, can read & write in:

- Korean

MY REFERENCES

Uzamee Kay Rivera

Senior Financial Planning Assistant

09452267327

uzameekayrivera@gmail.com

Ashley Ann Quiroben

Financial Planning Assistant

09167310273

ashquiroben@gmail.com

SOFTWARE & TOOLS USED:

- Microsoft Office (Word, Excel, Powerpoint, Publisher)
- Google Docs, Google Sheets, Google Drive
- Adobe Reader
- Microsoft Outlook
- Xplan
- Centrelink
- MyNorth Portal
- AMP Portal
- Macquarie
- AIA
- TAL
- Salesforce
- Colonial FirstWrap
- PortfolioCare
- KVCare
- Zoom
- Adobe Photoshop
- Canva
- Sony Vegas Pro

TALENTS & HOBBIES

- Photo & Video Editing
- Writing Essays, Poems and Stories
- Reading books
- Organizing Events
- Customizing merchandise
- Do Charity Work
- Do Slam Poetry
- Singing
- Playing instruments
- Cross-stitch
- Watching Kdramas
- Watching True Crime documentaries