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Habitat 3, Bajumpandan,  
Dumaguete City,  
Negros Oriental, 6200

## Education

**Bachelor of Arts in Theology**  
*Presbyterian Theological College*  
2016 - 2020

## Expertise

Data Entry  
Cold Calling  
Client relations  
Basic Accounting  
Customer Support  
Back-office Support

## Language

English  
Tagalog

# RICHEL ROSALES

## CLIENT RELATIONS OFFICER

### Profile

Results-driven professional with expertise in managing review documentation, coordinating communications, and updating records. Proficient in resolving customer inquiries, processing loans, and handling insurance applications. Skilled in educating clients on health care options and maintaining accurate, high-quality data.

### Work Experience

#### DEC 2023 - SEPT 2023 Migration Business Services Ltd.

##### CLIENT OFFICER

- Prepare and manage review documentation: Compile and organize review packs, including agendas, insurance schedules, reverse FNA, and superannuation reports.
- Coordinate communications: Send emails to advisers and clients, including Astute Wheel and FSG communications, and ensure follow-ups as needed.
- Update and maintain records: Manage updates to Xplan from the Portal and ensure accurate and current information is reflected.

#### JAN 2022 - JUL 2023 ECE CONTACT CENTERS

##### BACK OFFICE/ FRONTLINE AGENT CHAT SUPPORT

- Assist and Resolve Inquiries: Provide support to customers via chat, addressing inquiries, resolving issues, and ensuring satisfaction.
- Process and Update Loans: Handle loan processing, update payments on accounts, and check account limits to manage customer requests effectively.
- Maintain Accurate Records: Keep detailed records of customer interactions and transactions to ensure accurate and up-to-date information.

#### AUG 2021 - NOV 2021 QUALFON

##### CUSTOMER SERVICE REPRESENTATIVE

- Handle Inquiries: Address questions on benefits, eligibility, and claims with accurate and timely responses.
- Educate on Health Care: Guide customers in selecting benefit plans and quality care providers.
- Coordinate with Providers: Assist with appointment scheduling, specialist connections, and manage enrollment, billing, and claims for New Jersey clients.

#### OCT 2020 - JULY 2021 SPI GLOBAL

##### DATA ENTRY/ INDEXER

- Process Insurance Applications: Handle house and car insurance processing for Florida clients with National General Insurance Company, including accurate data entry.
- Review and Convert Data: Edit and convert files to required formats, ensuring compliance with project specifications and tagging requirements.
- Maintain Records: Update and manage client data, ensuring accuracy and adherence to formatting standards.

### References

**Adelita Chua**  
MBS Ltd. / HR Officer

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**Catherine Ozoa**  
Supervisor / Qualfon

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