

Emma-Jean Hoang

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PROFESSIONAL SUMMARY

Dedicated and detail-oriented insurance professional with a strong background in customer service, banking, and relationship management. Currently serving as an Account Executive and Administrator at an insurance brokerage, holding a Property and Casualty Insurance License. Adept at analyzing policies, ensuring compliance, and delivering exceptional service to clients. Proven ability to manage multiple tasks efficiently while maintaining accuracy and professionalism.

EDUCATION

Bachelor of Science in Health and Wellness

Purdue University Global – Expected Graduation: April 2025

GPA: 4.0

Dean's List, President's List

Phi Theta Kappa Honor Society

Associate of Science in Health Care

Lord Fairfax Community College

President's List, Dean's List, Phi Theta Kappa Honor Society

PROFESSIONAL EXPERIENCE

Spherient Advisors–Richmond, VA

Account Executive & Office Administrator

September 2024 – Present

- Manage client policies, ensuring compliance with industry regulations and company standards.
- Analyze and process commission statements, breaking down data by agent and maintaining accurate financial records.
- Utilize AMS (Agency Management System) to track policy status and insurer details efficiently.
- Develop and maintain strong relationships with clients, providing excellent service and support.
- Manage bookkeeping in regard to commission, payroll, and managed accounts receivable and payable.

Atlantic Union Bank – Glen Allen, VA

Universal Banker

April 2023 – September 2024

- Provided expert guidance on banking products and services while ensuring compliance with financial regulations.
- Identified cross-selling opportunities to match customers with suitable financial solutions.
- Managed loan applications and resolved client issues efficiently.
- Maintained Notary and NMLS certifications to support banking operations.

Chase – Glen Allen, VA
Universal Banker
July 2022 – March 2023

- Delivered top-tier customer service by understanding client needs and offering tailored financial solutions.
 - Ensured compliance with banking regulations while processing transactions and managing client portfolios.
 - Assisted with loan applications, financial advisement, and account management.
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LICENSES AND CERTIFICATIONS

- Property and Casualty Insurance License
 - Notary Certification
 - NMLS Certification
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CORE COMPETENCIES AND SKILLS

- Insurance policy analysis and compliance
 - Customer relationship management
 - Financial analysis and reporting
 - AMS (Agency Management System) proficiency
 - Problem-solving and critical thinking
 - Strong written and verbal communication
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VOLUNTEER WORK

Medical Mission – Madagascar & Namibia

- Traveled with a medical team for six months in 2019 to provide medical exams and health education.
 - Assisted in conducting wellness check-ups, distributing medical supplies, and teaching preventative healthcare practices.
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TECHNICAL SKILLS

- Microsoft Office Suite (Excel, Word, Outlook)
- Agency Management Systems (AMS)
- CRM software proficiency