MARIA THERESA HERBOLINGO

OBJECTIVES

A remote professional with 5 years of experience working with US Clients, CEOs, and companies. She proved a service with commitment, passion, and integrity. It is her best intention to continually grow her skills and knowledge as a Career woman in order to offer quality services to clients. She never stops learning and aiming for higher competencies..

WORK EXPERIENCE

Client Relationship Executive

DYNAMIC GROUP OF COMPANIES

September, 2021- December, 2022

- Provide excellent customer service support to customers via relevant communication channels.
- Maintaining a positive, empathetic, and professional attitude toward parents by taking the extra mile.
- Answering inquiries about our services via Freshdesk - Fresh call/ Gmail.
- Answering WhatsApp calls /messages.
- Managing therapists' and teachers' calendars: Booking appointments: book new assessments and make changes in appointments.
- Informing clients as well as therapists about changes in the calendar. Calling clients about
- changes in appointments due to therapists' unavailability.
- Liaising and supporting front desk staff in tasks that can be done remotely.
- Respond to professionals' emails and requests.
- Be proactive to upsell or cross-selling our services to customers when required and ensuring customers' needs are met.
- Other Ad-hoc tasks assigned by the management.

WORK EXPERIENCE

Administrative Support for Operations

GREGORY CPA SERVICES, LLC

August 2019- September, 2021

- Client follow-up & Communication,
- Quickbooks & Basic Bookkeeping,
- Create engagement letters for tax planning, bookkeeping services, wealth & tax strategy services. Edit power of attorneys, send out documents for client signatures. Converting files to pdf, transciptions and minutes of meeting
- Organize files, creating documents and maintain CRM -Canopy Delight.
- Facilitate client boarding and monitoring of wealth strategy sessions, welcome packets and feedbacks
- Create entity Map for all clients, computer net worth summary, assets and liabilities. Support Accounting team for clients with IRS Audit and Tax Filing due dates,
- Monitor Bookkeepers and Accounts in servicet completions.

WORK EXPERIENCE

Executive Assistant

DIGSY, INC.

June 2017- July, 2018

- Responsible for email management and organization
- Responsible for calendar management, scheduling, and prioritizing executive activities
- Provide recommendations on creating and how to improve the existing process through the notion
- Create an onboarding template, checklist, and task management
- Refine and design Powerpoint presentations
- Organize travel plans and book flights
- Data entry and database management
- Performs other related duties as may be assigned from time to time
- Coordinating Team Members using these chat messaging apps (Slack, Telegram) basic meetings/communication with the department for any shout-outs/daily updates
- adhere to security/confidentiality processes
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General Administrative Assistant

LANCASTER PROPERTY SERVICES

August 2018-- August, 2019

- Receiving and processing job/work order
- Set-Up appointments for property servicing schedule.
- Review and book a service man for each job order for repairs, servicing and installation.
- Handling inbound calls from clients
- Receiving maintenance request and answering other clients' concerns using Freshdesk.
- Preparing and sending invoices using servicem8.
- Creating and preparing invoices to each clients.
- Managing files and contacts using CRM
- Assist in other business operations cleaning services,

Outbound Sales Associate

GOODWILL FINANCIAL

June 2016- March 2017

- Conducts outbound calls promoting company's various insurance package including life and health insurance.
- Initial intake interview and health assessment of clients. Prepare and assist application forms, sending of quotation for a specific age-based plan proposal, client, or pre-membership orientation.

WORK EXPERIENCE

Outbound Sales Associate (Continued)

- Process re-marketing of insurance before expiration. attaching documents to the customer management system, incoming phone call handling,
- Data Entry from reports to the system, responsible for maintaining client's files in accordance with company policy and procedures, responsible for accurate data entry of measurement and client specifications, ensure that all data is backed up, creating accurate spreadsheets and calling different insurance carrier for updated client insurance files.
- Database and CRM management
- Other tasks as assigned

TRAINING

- **Quick Books & Xero Training**
- **Project Management Training**
- Property Management Training

EDUCATION

Bachelor of Science in Psychology

- **SAMAR STATE UNIVERSITY**

2006-2010

Master of Arts in Guidance & Counseling

- **EASTERN VISAYAS STATE UNIVERSITY**

2012- 2015

Registered Psychometrician

- **BOARD LICENSURE EXAMINATION FOR PSYCHOLOGISTS AND PSYCHOMETRICIANS**
- **LICENSED PROFESSIONAL TEACHER**

2017 to present

TOOLS

- **Notion, Trello, Asana, Monday.com**
- **Airtable, Google & Microsoft Productivity tools, Servicem8, Spotlight, Canopy**
- **Salesforce, Quickbooks, Timely, Freshdesk,**
- **Nexsure Cloud and Attachment Manager**
- **Turbodial, dropbox, aircall, slack, zoom,**
- **Zoho CRM, LeadSimple, Vimeo, Canva, AWS, Keap etc**