

ROXANNE B. Timbol

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36-Champaca Dao St. Marikina Heights

Marikina City



CAREER OBJECTIVE: To be proactive member of an organization wherein my skills and knowledge will be utilized towards contributing to company's growth and productivity.

EMPLOYMENT EXPERIENCE

1. Client Retention Success / Executive Assistant

Crown Money (May 2025 – Feb 2026)

- Client Support, Executive Assistant & Administrative:
 - Handle inbound calls and clients' inquiries professionally
 - Manage the broker's calendar and appointments efficiently
 - Oversee the broker's email inbox, responding where appropriate and delegating tasks as needed
 - Prepare pre-meeting documents and broker notes.
 - Organize and maintain documentation for loan applications.
 - Create process manual for reference
 - Identify system issues and perform necessary system configurations.
 - Follow up on outstanding items from clients.
 - Monitor and track deadlines to ensure client requirements are met and satisfaction is achieved.
 - Prepare and send monthly statements to clients to provide regular updates on their loan status.
- Client Retention and Engagement:
 - Conduct follow-up calls after settlement to ensure client satisfaction and address any concerns
 - Implement retention strategies to keep clients engaged with Crown Money's services
 - Encourage and collect client feedback, testimonials and google reviews.
 - Coordinate and send client appreciation gifts and milestones hampers
- Customer Service & Support:
 - Point of contact for existing clients, providing exceptional services and addressing inquiries
 - Manage and resolve customer service concerns in a timely and professional manner
 - Assist clients with account updates, refinancing queries, and new loan opportunities
- Client Equity & Monitoring Report:
 - Prepare Annual and Loan Review Report in Canva.
 - Measure and track Client's equity positions to provide financial insights.

- Generate and present reports on client accounts, retention rates and service success metrics
- Loan & Appointment Management:
 - Identify opportunities for refinancing or new loans for existing clients.
 - Assist clients with loan applications and ensure a smooth process
 - Book and manage client appointments for financial reviews and consultations
- Loan & Deal Management
 - Track and oversee the pipeline of loan applications, ensuring timely progress
 - Liaising with our 2 other VA to ensure deals are moving through the pipeline and deadline for finance and settlement is on track
 - Assist with Lead Management, including follow ups, and database updates
 - Book appointments with Clients, lenders, and other stakeholders

2. Mortgage Broker Support / Loan Processor / Executive Assistant

Family Home Finance (April 2024 – May 2025)

- Handle loan applications from application lodge up to settlement
- Prepare all documents for lender submission
- Data entry to several platforms such as CRM, Quickli , Corelogic and Apply Online
- Communicate with Clients on all required information/documents to submit
- Analyze Client's financial statements, pay slips, credit reports etc.
- Thoroughly check lender's policy to find the best solutions on every Client's situation
- Liase with Brokers to confirm strategy to provide the best solution for Clients
- Conduct serviceability for each lender to check the surplus to meet bank's requirements
- Prepares loan document guide, home loan proposals and compliance documents for Clients
- Provide timely updates to Clients on application status
- Handle complex strategy for Client's loan application
- Sending emails, communicates to Client on missing information and other conditional approval requirements
- Keeping track of the loan application to get Unconditional Approvals
- Prepares pricing and escalating approvals to get better rates for comparison
- Prepares property valuations and analyzing LVR and LMI
- Review of Client's scenario and situation for loan applications
- CRM Tools: ApplyOnline, Mercury, Connective, Quickli and Corelogic

3. Team Lead – Customer Service Professional

Loanworks (October 2016 – April 2024)

- Oversee day-to-day team's operation and performance.
- Do regular performance evaluation.
- Motivates team and assesses performance including coaching to set team goals.
- Account management for existing and new customers.
- Providing excellent customer service for new and existing customers with respect to system configuration and management features.
- Handles end-to-end user experience on using the system to identify and evaluate customer experience.

- Handles support tickets and answer queries with respect to system process and features.
- Conducts end-to-end testing on system installation, changes, and development.
- Answering day to day concerns, queries and customer complaints through email and phone calls
- Conducts internet and phone-based end-user training for both new and existing customers.
- Assisting technical support team members to resolve end-user support queries, this can include troubleshooting with customers and responding to queries relating to the product.
- Working with developers to ensure a positive initial experience for new customers, liaising with customers, coordinating customer-specific requirements.
- First contact replying to incoming tickets for users
- Solving user errors/issues and communicating ticket resolution to users.
- Forwarding bugs to Support, Dev and QA
- Responsible for creation of document manual and process guide to support the product.
- Process broker's commissions and document template creation.
- Analyze and document business requirements for enhancement requests.
- Responsible for ongoing maintenance and enhancement of system documentation and training materials.
- Do internal training for new hires regarding the services and products offered.

**4. Client Relationship Representative (New Business- Broker's Account)
MediCard Philippines Inc. (April 2014- June 2016)**

- Responsible for maintaining and developing business relationships.
- Initial preparation for proposal request.
- Proofreading of benefits and rates in proposal.
- Computation on adjustment on rates.
- Conducts product orientation and presentation.
- Conducts regular visits and quarterly reviews with clients.
- Answering day to day concerns, queries and customer complaints through email and phone calls
- Revise and prepare Summary of Benefits of accounts.
- Coordination with different unit office for different concerns of client.

**5. Junior Customer Care Officer (Aftersales Broker's Account)
MediCard Philippines Inc. (April 2011- June 2016)**

- Responsible for processing the renewal of accounts.
- Answering day to day concerns, queries and customer complaints through email and phone calls
- Receives phone inquiries and/or phone- in complaints from clients.
- Process request of enrolment, deletion of members, corrections of billing statement, reimbursement, and schedule of Annual Physical Exam/Pre-employment/Executive Check-up.
- Log and monitor outgoing documents.

- Revise and prepare Summary of Benefits of accounts.
- Coordination with different unit office with different concerns of client.
- Conducts product orientation and presentation.

EDUCATIONAL BACKGROUND

2007-2011

TERTIARY

Far Eastern University
 Bachelor of Science in Commerce Major in Management
 Nicanor Reyes Street Sampaloc, Manila

2003-2007

SECONDARY

Roosevelt College Lamuan
 J.P Rizal St. Lamuan, Makati City

1997-2003

PRIMARY

Roosevelt College Lamuan
 J.P Rizal St. Lamuan, Marikina City

SEMINARS ATTENDED:

Professional Leadership Training	September 25, 2019
Sales Leadership Training	November 26, 2015
Professional Image Development	November 12, 2015
Write Right for Positive Results	September 4, 2015
Advance MS Excel Capabilities	May 6, 2015
Refresher Course on English by Dr. Dups	August 6 and 7, 2012
Project Embrace	March 13, 2012

PERSONAL DATA:

Nickname	Xanne
Civil Status	Married
Citizenship	Filipino
Date of Birth	15 April 1991
Place of Birth	Marikina City
Height	5''
Gender	Female
Language (written and spoken)	English and Tagalog

SKILLS:

- Excellent interpersonal skill
- Good management skill
- Manages multiple tasks
- Potential and confident to function independently to achieve desired goals
- A record fulfilled all given jobs to satisfaction
- Very keen to details

- Speaks truthfully and acts sincerely
- Responsible and Trustworthy
- Computer Literate
- Good in oral and writing skills
- Dynamic Personality