

# **THERESA OCAMPO FERNANDEZ**

5864 Texhoma Avenue  
Encino, CA 91316  
310.720.4254  
techfernan@gmail.com

## **PROFESSIONAL SUMMARY:**

- Self employed businesswoman who built a business in the life and medical insurance industry for over 30 years with a production base of 400 clients consisting of High Net Worth individuals, small business corporations, pension plans and medical societies
- Independent broker of life and medical insurance products representing over 30 companies covering life, health & disability insurance, long term care benefits, fixed and variable annuities and mutual funds with the likes of New York Life, Mutual of New York, Sun Life of Canada, Prudential Insurance, Transamerica, National Life of Vermont, Lincoln National Life Blue Cross, Blue Shield and other highly rated financial institutions
- Created a sub agency network in the Philippines selling International Global medical insurance to high network families
- Excellent communication, business development, customer support and interpersonal skills
- Aggressive demeanor exhibiting a dynamic sales presence with an ability to size people up within a few minutes of meeting them
- Strategic risk management and financial planning ability
- Genuine interest in understanding client needs and in providing customized solutions to their needs
- Ability to learn new concepts and procedures quickly and to adapt to changing circumstances
- Dependable, courteous and professional
- A team player willing to go the extra mile to get the job done

## **ACHIEVEMENTS:**

- Business generated an average face amount insurance volume of close to \$7 million a year
- Closed a \$10 million face value life insurance policy for a High Net Worth client
- Generated an average of \$100,000 in sales production commissions
- Provided the health and welfare benefit package for a very well-known cruise line involving its 2000 to 3000 security guards.
- Created a cross purchase agreement for business insurance purposes and implemented estate planning tied in with a living trust for a very wealthy and prominent family owned business engaged in steel manufacturing.
- Provided medical insurance for a large company involved in executive protection, uniformed security service, hostile workplace termination and workplace violence
- Provided keyman insurance for 2 important employees of a company with a face value of \$10 million and a monthly premium of \$8,000 a month
- Worked as the Financial Advisor and sole insurance disability provider of PMSSC (Philippine Medical Society of Southern California) and holding seminars on long term care and disability products presenting this information to over 100 members
- Included in the Presidents Club and Top Club of insurance sales professionals
- Received an award from the Philippine American Chamber of Commerce in Long Beach for outstanding service

## **EDUCATION:**

Bachelor of Arts Degree Major in Mass Communications  
De la Salle University  
Manila, Philippines

Assumption Convent in Herran, Manila Philippines  
Grade School and High School

**THERESA OCAMPO FERNANDEZ**

*Theresa Fernandez or Tech, as she is better known, belongs to a well connected family in the Philippines. Her father is one of the five (5) founders of the largest private hospital in the Philippines called Makati Medical Center. He is also the founder of the Philippine Dermatological Society of the Philippines and is considered as the pillar of dermatology in the country.*

*Due to the environment she grew up in, Tech grew up with the children of Manila's business elite. She went to the same schools they attended. She went to the same birthday celebrations and social gatherings that they went to.*

*Right after college, she was approached by a friend to sell shares in a resort that was going to be built in a city very close to Manila. She wanted to borrow the family car but her father did not allow her to use it when he learned that she was going to be in sales. He wanted her to have a profession leaning more towards a desk job. Undeterred, Tech walked the Makati area (namely Legaspi and Salcedo Village) and knocked on doors doing purely cold calls. She told the people that, although they did not know her, she only asked for 20 minutes of their time. Because of her persistence & tenacity, it resulted to enough volume in sales wherein the company gave her a car for her achieving enough volume in sales performed in a span of 3 months wherein her peers took over 6 months to achieve.*

*When Tech went to the United States, she had no real intention of staying. By sheer determination (once she decided to stay), she called the President of a top Filipino bank asking if he could help her. He was astounded by her honesty and candor, asked to meet her the next day and gave her a job. After working for 6 months in the job he referred her to, she ventured into the insurance business in 1981 and the rest is history. Although she did not know very many people, this did not stop her. She simply requested from the President of the bank to give her all the clients from the small business loan manager. And this is where her client base started.*

*She continues to visit the Philippines periodically to renew acquaintances among her circle of friends and family and is now meeting the next generation of potential clients, the children of her friends and relatives. She already has a built-in sub agency in Manila that markets global medical insurance to high net worth families.*