



RACHEL ORTEGA
Private Health Insurance Specialist

“Finally, brothers, whatever is true, whatever is honourable, whatever is just, whatever is pure, whatever is lovely, whatever is commendable, if there is any excellence, if there is anything worthy of praise, think about these things.”

- Philippians 4:8

PROFESSIONAL ACHIEVEMENTS

- | Consistent top seller brokers for group account , Maxicare Healthcare Corp.

PERSONAL ACHIEVEMENTS

- | Built and maintain a wide range of individual and group/corporate accounts.
- | Proud mom of 2 boys and a wife to a loving husband.
- | Avid table tennis player.
- | Love to explore to different type of sports.

Rachel is a widely regarded as a knowledgeable and trustworthy healthcare advisor with over 15 years of experience in the industry. With a customer-centric approach to service, she take time to listen to clients to gain understanding of their needs and concerns.

She is always willing to go to the extra mile to offer guidance and support to clients, providing in depth analysis and recommendations customized to their unique requirements.

AREAS OF SPECIALIST FOCUS

- | Assessing clients healthcare needs, including preventative care, chronic disease management and recommendations of appropriate coverage levels
- | Assisting clients with potential upcoming medical procedures
- | Providing on-going support client support
- | Providing guidance, support and advocacy to clients ensuring they are informed, equipped and confident in making decisions regarding their healthcare insurance needs

PRIVATE WEALTH MANAGEMENT

- | Retirement Modelling & Planning
- | Estate Planning & Fiduciary Review
- | Quantitative Portfolio & Fund Analytics
- | International Tertiary Education Planning
- | Direct International Property Investments
- | UK & US Pension Planning & Transfers
- | Portfolio Gearing & Sophisticated Investments
- | Mutual Funds & Exchange Traded Funds
- | Direct Share Investments
- | Investment Bank Products
- | Employee Benefit Schemes
- | Business Assurance
- | Health Care