

PERSONAL LINES ACCOUNT MANAGER



WHITLEY
INSURANCE & FINANCIAL SERVICES



NAVACORD®

TRENTON, ON | REPORTING TO: President

POSITION OVERVIEW:

Whitley Insurance & Financial Services is hiring for a Personal Lines Account Manager. The successful incumbent will be responsible for maintaining a book of business, generating new business, servicing client needs, and assisting the producer on new business activities.

RESPONSIBILITIES:

- Respond promptly to telephone, email and fax enquiries, ensuring a high level of service is maintained
- Renewal review, recommendations, comparison quotes and remarket when needed
- Total account sales awareness, cross sell and up sell as much as possible
- Action all renewals, endorsements and claims
- Process change requests on EPIC/company portals, when needed
- Review and invoice all endorsements (and renewals, if necessary)
- Issue in-house endorsements and new business on company portals, when needed
- Release renewals after making appropriate changes , when needed
- Scan and attach documents to EPIC
- Quote cross sells and up sell as much as possible
- Issue pink slips when needed in addition to completing miscellaneous duties as assigned
- Prepare new business documents to be sent for signatures, etc.
- Report order: MVR, Autoplus, HITS
- Support other members of the team when needed

REQUIREMENTS:

- Minimum 3-5 years insurance experience
- R.I.B.O. is required and preferably working towards C.I.P. or C.A.I.B. designation
- Client development / relationship management experience
- Superb interpersonal and presentation skills and attention to detail
- Ability to be a self starter with strong written and oral communication skills in addition to strong organizational skills
- Proficiency in Outlook, Word and EPIC



*We are committed to providing accommodation upon request for applicants and employees with disabilities.
If you require accommodation, we will work with you to meet your needs.*