

# INSURANCE ACCOUNT ASSOCIATE

## Commercial Lines



**Location: Toronto**

**Reporting to: Vice President, Insurance Practice Leader**

### POSITION OVERVIEW

Petrela, Winter & Associates ("PWA") is hiring for a Commercial Lines Insurance Account Associate to provide service support on a portfolio of high quality construction insurance business. This is a unique opportunity to join an entrepreneurial specialty commercial brokerage and industry leading brand, and to be a part of an elite group of insurance professionals in a mutually supportive, successful, and rewarding team environment.

Specializing exclusively in construction for over 40 years has given PWA a distinctive character and market focus which sets it apart from the generalist broker industry, and, in turn, provides a differentiated career opportunity with meaningful recognition, job satisfaction, and growth.

### RESPONSIBILITIES:

- Manage account documentation (i.e., routine inquiries, quotes, binders, statement of values, insurance contracts, endorsements, cancellations, etc.)
- Review accuracy of policy documents prior to the delivery to the client
- Support of service team as required to generate certificates of insurance and automobile pink slips
- Prepare proposals for prospects in collaboration with account executive
- Manage abeyances
- Invoicing
- Input of client policy data into client management system (Epic)
- Intermediate knowledge of excel to create premium comparison and other spreadsheets
- Creating policy binders to send out to clients
- Prepare renewal requests to the clients 90 days in advance
- Other duties as assigned

### REQUIREMENTS:

- Minimum 2 years insurance experience and at least 1 year in Commercial Lines
- R.I.B.O license required
- Good interpersonal skills, presentation skills and attention to detail
- Ability to be a self-starter with strong written and oral communication skills as well as organizational skills
- Intermediate to advanced proficiency with MS Office suite, and preference given to candidates with familiarity with EPIC

**Qualified candidates are invited to email their resume and cover letter to: [ejaspe@petrela.com](mailto:ejaspe@petrela.com)**



*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.*