

PERSONAL LINES ACCOUNT ASSISTANT



WHITLEY
INSURANCE & FINANCIAL SERVICES



NAVACORD

TRENTON, ON | REPORTING TO: President

POSITION OVERVIEW:

Whitley Insurance and Financial Services is hiring for a Personal Lines Account Assistant. The successful incumbent will be responsible for assisting the Account Manager in servicing the client with their insurance needs from the moment they call and inquire to binding coverage accurately and professionally.

RESPONSIBILITIES:

- Provide technical assistance to Account Managers
- Discuss any concerns or outstanding info with underwriters
- Provide back-up support to Account Managers when required
- Preparing comparison quotation on renewals where necessary
- Prepare new business documents to be sent for signatures, etc.
- Action all renewals, new business, endorsements and claims
- Process change requests on EPIC
- Review and invoice renewals and endorsements
- Issue in-house endorsements and new business on company portals
- Release renewals after making appropriate changes
- 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

REQUIREMENTS:

- Minimum 1-2 years personal insurance experience ideal
- R.I.B.O is required and preferably working towards A.I.I.C. or C.A.I.B. designation
- Client development / relationship management experience
- 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.*