

Position:	Personal Lines - New Business Sales	Branch:	Sudbury, Ottawa, Windsor
Department:	Personal Lines	Status:	Full Time
Reports To:	Manager, Personal Lines	Direct Reports:	None

Primary Role Responsibilities and Accountabilities:

The Personal Lines New Business Sales position pursues and closes new personal lines business and provides in-house customer service to clients, handles and processes endorsements and renewals.

Major Responsibilities:

1. Increase Personal Lines New Business sales by surveying prospects to determine insurance needs, collecting detailed risk and underwriting information including quoting and binding coverage.
2. Check incoming new business for accuracy in rating, type and coverage. Confirm or correct all transactional, billing and activity coding in Broker Management System. Create and mail appropriate forms and/or information package to new clients.
3. Maintain an abeyance system to follow-up outstanding requests, documentation correspondence, reports and payments. Follow-up on overdue items according to accepted timelines
4. Monitor, track and distribute leads and x-dates. Create prospects and activities as appropriate.
5. Perform online interface with various insurers, including uploading and keying applications for new business.
6. Use carrier interface to key new policies, following company and brokerage standards, to use straight through processing protocols.
7. Perform online interface with various insurers, including uploading and keying applications for new business. Perform administrative duties associated with quoting and processing new personal lines business
8. Order all underwriting reports (MVR, AutoPlus HITS) and generate accurate ITVs based on information provided.
9. Perform special projects and miscellaneous duties at management request.
10. Maintain acceptable results on workload and workflow audits.

Minimum Qualifications:

1. Post-secondary education
2. 1-2 years personal insurance sales and service experience.
3. RIBO license required
4. Bilingual in French and English
5. Willingness to obtain Autorité des marchés financiers (AMF-Personal Lines) license.
6. Strong customer focus and attention to detail.
7. Ability to manage multiple tasks and follow-up on uncompleted tasks
8. Ability to work in a fast paced and electronic file environment
9. Effective written and verbal communication
10. High performance team player with positive and outgoing attitude
11. Proficient in Microsoft Office – Outlook, Word and Excel

Qualified candidates are encouraged to apply by submitting your cover letter and resume to careers@pblinsurance.com quoting job #**S17-04**

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