

Job Posting



Job Title: Account Administrator **Reporting To:** Michele Johnson,
Manager Personal Lines

Department: Personal Lines **Location:** Oakville Head Office

Start Date: TBD

Company Overview:

The Magnes Group Inc is one of Canada's leading independent insurance brokerages. Magnes has unique commercial insurance expertise in several industry niche markets, as well as private client insurance and corporate group benefits consulting. Magnes offers specialized services ranging from global insurance placement to innovative risk management strategies.

Magnes is licensed nationally across Canada with offices in Oakville, Toronto, Vancouver and Montreal. Magnes is also proud to be a member of the exclusive Assurex Global Network. Our clients benefit from strategic international partnerships with the ability to “think globally and act locally”.

Magnes proudly employs some of the best insurance professionals in the business. Our team consists of a dynamic group of individuals, including some of the brightest minds in risk management. Our vision is to be a “magnetic” organization that naturally attracts and retains the very best in class of clients, suppliers, partners, and most importantly, our employees.

For more information, visit our website: www.magnesgroup.com

Position Summary & Objective:

- The Personal Lines Account Administrator will be responsible for daily invoicing, processing of new business and endorsements on portals, as well as the preparation and issuance of binders, COC’s and liability slips. The role requires the AA to assist the Account Manager in with the delivery of seamless service to the clients.

Essential Functions:

Daily Download (ADI & EDI)

- Invoice all documents through ADI
- Invoice all agency bill policies
- Update billing details screens with accurate annualized premiums
- Prepare and mail invoices on agency bill policies
- Ensure all PDF copies of policies are attached to TAM
- Distribute billing notices that come in daily download
- Check all documents keyed in portal against requests to ensure accuracy

Portal Entry

- Key all new business, endorsements, rewrites or skims on company portals
- Process billing changes on company portals

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- Update portals with data as requested by Account Managers

Payments

- Process clients credit card payments on company portals
- Mail clients' cheques directly to insurance companies
- Handling incoming payment calls from clients

Additional Duties:

- Provide back-up assistance for main Reception
- Daily mail distribution and scanning
- COC's and binders as requested
- Actively participate in continued learning programs or training
- Communicate with companies in regards to download issues
- Follow up with underwriters on outstanding requests
- Scanning and attaching of documents
- Send letters to clients
- Assist with other various clerical duties
- Maintain good working relationships within department and office
- Perform other specific duties or projects when assigned
- Exhibit the core values of the Magnes team

Performance Expectations:

- Adherence to department workflows
- Adherence to department service standards to clients, employees & vendors

Core Competency Standards:

- ACCURACY AND ATTENTION TO DETAIL – Ability to perform work accurately and thoroughly.
- COMMUNICATION – Ability to communicate effectively with others using the spoken and written word. Ability to actively attend to, convey, and understand the comments and questions of others.
- CONFIDENTIALITY – Ability to maintain strict confidentiality in accordance with MAGNES privacy guidelines for client and employee information, as well as proprietary information.
- CUSTOMER ORIENTED – Ability to take care of the customers' needs while following company procedures.
- RELIABILITY – The trait of being dependable and trustworthy.
- TEAMWORK – Ability to be part of a team and work cohesively to achieve goals.
- TIME MANAGEMENT – Ability to utilize the available time to organize and follow a systematic method of prioritizing tasks in order to complete work within given deadlines.
- PROFESSIONALISM – Represent MAGNES professionally both internally and externally at all times.
- INITIATIVE – Ability to make decisions or take actions to solve a problem or reach a goal.
- SELF-MOTIVATED – Ability to be internally inspired to perform a task to the best of one's ability using his or her own drive or initiative.
- RESPONSIBLE – Ability to be held accountable or answerable for one's conduct.
- RESPECT – Values the backgrounds, experiences, opinions, feelings and the contribution of everyone in the course of delivering our services.

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- INTEGRITY – Recognizes that building trust demands honesty. Displays a commitment to doing what we promise. Ability to be truthful and be seen as honest and credible in the workplace.
- INNOVATION – Constantly strives to improve both our culture and the value proposition to our customers by searching for better solutions, processes and tools.

Job Specific Competency Standards:

- ANALYTICAL SKILLS – Ability to use thinking and reasoning to solve a problem.
- PROBLEM SOLVING – Detects potential problems at an early stage and seeks to solve them before they escalate. Uses analytical skills and creativity to solve problems. Knows when to ask for assistance or advice. Utilizes the available resources of the company.
- PRODUCT AND MARKET KNOWLEDGE – Understanding and awareness of products and services offered, not only by MAGNES, but also by competitors. Takes the time to understand customer needs and is able to match products and services to those customer needs. Up to date on current industry changes.
- RELATIONSHIP BUILDING – Ability to effectively build relationships with customers, suppliers, and co-workers.
- WORKING UNDER PRESSURE – Ability to be flexible and complete assigned tasks under stressful situations in a professional manner.

Skills & Qualifications:

Education	- Post Secondary Degree, preferred
Languages	- Ability to speak French would be viewed as an asset
License & Certification	- RIBO License required, CAIB, CIP, & CRM is an asset
Industry Experience	- Minimum one year of industry experience
Computer Skills	- Proficiency in TAM, advanced MS Office & Excel skills
Other Technical Skills	- Working experience of Compuquote & Company Portals is a definite asset

Compensation:

- Salary Range Guideline
- Bonus Incentives
- Vacation Days
- Personal Days & Birthday
- Sick Days
- Group Benefits Plan
- Registered Retirement Savings & Pension Plan
- Education Reimbursement
- Recruiting Referral Fees

Please send Cover Letter & Resume to: Careers@magnesgroup.com