

# Job Posting



<b>Job Title:</b>	Private Client Junior Account Manager	<b>Reporting To:</b>	Carol Gillingham, Manager Personal Lines
<b>Department:</b>	Personal Lines	<b>Location:</b>	Oakville Head Office
<b>Start Date:</b>	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](http://www.magnesgroup.com)*

## Position Summary & Objective:

- The Private Client Junior Account Manager will be working directly with Account Executives, Account Managers and Company Insurance Underwriters and will be responsible in maintaining an accurate Broker Management System data base as well as collaborating with the Account Manager and Account Executive on client insurance portfolios to ensure exemplary customer service to all internal and external clients.

## Essential Functions:

- Renewals
- Complete portfolio summaries on renewals as requested by Account Managers or Account Executives.
- Review renewal documents for accuracy and upsell opportunities
- Provide alternate quotes for deductibles and coverages, as requested
- Prepare renewal binders to be mailed or emailed to clients, as requested
- Prepare submissions worksheets when requested by Account Managers or Account Executives to market files
- Support the Account Managers to prepare for the client annual review
- Correspond with Account Managers or Account Executives on outstanding renewals
- Meet/exceed expectations of delivery of all client renewal documents

# Job Posting



- Support the Account Managers in dealing directly with the customer as required

## New Business

- Review new business to ensure issued as requested
- Complete new business welcome package
- Mail or email new business package directly to clients
- Correspond with Account Managers or Account Executives on outstanding new business policies

## Amendments

- Review amendments to ensure issued as requested
- Process amendments directly with company, as requested
- Mail or email amendments directly to clients within outlined time commitments
- Correspond with the Account Managers or Account Executives on outstanding amendments
- Support the Account Managers in dealing directly with the customer as required

## Invoicing

- Complete all invoicing for non-downloading insurers
- Ensure billing screens are populated with accurate annualized premiums
- Prepare and mail invoices on agency bill policies
- Ensure all PDF copies of policies are attached to EPIC

## Payments

- Call out to clients regarding expiring credit cards or reminder notices

### **Additional Duties:**

- Exhibit the core values of the Magnes team
- Daily mail distribution and scanning
- COC's and binders as requested
- Actively participate in continued learning programs or training
- Portal entry
- Letters to clients
- Assist with other various clerical duties
- Maintain good working relationship within department and office
- Perform other specific duties or projects when assigned
- Other duties as required

### **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 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 while delivering our services.
- 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.
- ADAPTABLE – Embrace change and be open to pivoting priorities when it is needed

## Job Specific Competency Standards:

- WORKING UNDER PRESSURE – Ability to be flexible and complete assigned tasks under stressful situations in a professional manner.
- RELATIONSHIP BUILDING – Ability to effectively build relationships with customers, suppliers, and co-workers.
- 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 can match products and services to those customer needs. Up to date on current industry changes.
- FOCUS ON CONTINUING EDUCATION - Willing to continue to embrace ongoing and continuing education as part of a professional and personal development initiative.

# Job Posting



## Skills & Qualifications:

Education	- Post Secondary Degree, preferred
License & Certification	- RIBO License required, CAIB, CIP, & CRM is an asset
Industry Experience	- Minimum one year of industry experience - Experience with HNW Insurers is an asset
Computer Skills	- Proficiency in EPIC, advanced MS Office & Excel skills
Other Technical Skills	- Working experience for 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](mailto:Careers@magnesgroup.com)