



Partners in Advocacy & Business

Job Description – Insurance and Risk Advisor

(aligns with GOA 015AS13)

Identification Section

Working Title: Insurance and Risk Advisor

Department: Aggregated Business Services

**Company/Division,
Branch/Unit:** AAMDC- Jubilee Insurance

Reports To: Manager of Insurance

**Levels to Executive
Director (E.D.):** 3

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

Under the general direction of the Manager of Insurance, the Insurance and Risk Advisor is responsible for provision of insurance services to the members. The Insurance and Risk Advisor will be responsible for service of various participants of the Jubilee Insurance Agency Ltd. insurance programs.

This position will have access to highly confidential member and association information and it is expected and required information be held in the strictest confidence

Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

- Insurance coverage assistance/inquiries
- Claims information
- Process members policy changes
- Schedule listing
- Invoicing, data entry and filing
- Renewal process for various insurance policies including property, heavy equipment, liability, umbrella, bond & crime, aviation, environmental and boiler & machinery policies.
- On-going professional development training to maintain license requirements and to improve the general operations of the agency
- Collection of Accounts Receivable and Statement Distribution for IRA's clients
- Assist at Spring & Fall Conventions
- The Insurance and Risk Advisor is responsible for clerical duties relating to incoming telephone and written correspondence.
- Provide quotes for new and existing members

Other duties as may be required from time to time, which may include:

- Board minutes
- Mail summaries
- Cheques in mail
- Invoicing, data entry and filing
- Reconciliations
- Seminar invoicing and collections
- Marketing to potential new members

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

SKILLS/EXPERTISE REQUIRED:

- A working knowledge of Commercial Insurance.
- Excellent Customer Service skills.
- Attention to detail.
- Maintain integrity in all dealings.
- Ability to be analytical, decisive and able to work independently while maintaining the parameters of assigned authority.
- Ability to utilize company technology to track and expedite all transactions.
- Proficient in all aspects of Microsoft Office.
- Strong interpersonal and communication skills.
- Ability to excel in a team environment.
- Ability to work without supervision.
- A valid Class 5 Alberta Driver's License.
- Ability to travel for occasional marketing/service Alberta Driver's license).

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an occupational certification/registration required for the job.)

Education:

Licensed or able to obtain a license as an Insurance Agent in Alberta for all classes

Contacts

(Main contacts of this position and the purpose of those contacts.)

Works alongside the other Insurance and Risk Advisors and the ABS Member Services Clerk.

Deadline is March 15, 2013, all resumes can be sent to miranda.marcinkoski@aamdc.com