



ACCOUNT MANAGER

Department: Personal Lines	Status: Permanent, Full-Time
Reports To: Manager, Personal Lines	Last Updated: May 15 th , 2017
Internal Interactions: Sales Team; Service Team; Commercial Team; DT Management Team; Administrative Staff; Underwriters; QA Specialists	
External Interactions: Industry Contacts; Industry Associations	

Summary

The role of the Account Manager (AM) is to provide front-line client service of Personal Lines policies and taking responsibility for the retention and account development of existing clients, while quoting and securing new business. The AM will leverage the industry knowledge and experience to provide a best-in-class client experience through offering customized solutions that will protect, comfort and recover, providing peace of mind to clients. The ideal AM is self-motivated, proactive, and client-focused, intent on providing exceptional day-to-day service to maintain and exceed the reputation and service standards of Dalton Timmis Insurance, a subsidiary of NFP Canada Corp.

Duties & Responsibilities

Client Service, Relationship Building & Collaboration

- Provides expert advice, recommendations and counseling to clients about their personal insurance coverage geared to their unique needs and exposures
- Conducts needs assessment to offer customized solutions to clients
- Completes proactive contact with clients at each renewal to develop strong relationships and strengthen the Dalton Timmis brand
- Provides exceptional day-to-day service to clients and handling the client file activities to maintain retention targets
- Contributes to premium growth targets by cross selling other lines and upselling appropriate coverages
- Prepare documentation for insurers, complete applications for clients, issue insurance certificates, process changes and review renewals
- Maintains professional and collaborative relationships with key underwriters
- Resolves any concerns or complaints with your personable and professional demeanour by leveraging product and service knowledge based on clients' needs
- Reviews and processes renewals, endorsements and midterm changes; rewriting/remarketing where necessary to enhance the client experience
- Issuing policies and changes on various insurer online portals
- Initiating and providing guidance in the claims process to provide peace of mind to clients and assist in recovering their assets
- Represents the brokerage at industry functions where required
- Keep current on industry changes, underwriting rules and workflow processes
- Actively participate in training initiatives





Key Skills & Qualifications

- Minimum of 5 years Personal Insurance experience
- Passion for client care; committed to delivering a top-notch client experience
- Must possess a valid RIBO license
- CIP, FCIP, or CAIB designation or working towards completion is an asset
- Possesses and displays professional presentation and demeanour and a solid understanding of the personal insurance business in a service-focused environment
- Self managing with strong analytical, organizational and time management skills
- Excellent interpersonal, verbal and written communication skills
- Strong team player—ability to adapt to and collaborate with various team members and individuals
- Ability to multi-task in a fast-paced environment while staying focused on priorities
- Proficient in the Microsoft Office suite of products, experience with EPIC and industry software and rating engines
- Professional, reliable and courteous to clients and colleagues

It is Dalton Timmis' policy to give preference to qualified internal applicants.

Dalton Timmis welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

Please submit all applications to humanresourcescanada@nfp.com.

Please note that due to the volume of applications received; only those selected for interview will be contacted.