

Part-Time Administrative Assistant

Department: Insurance
Reports To: Branch Manager
Supervises: None

Job Description:

The Insurance Administrative Assistant is responsible for providing support and assistance to all employees within the office including Producers and Account Managers. The Administrative Assistant will also perform basic office administration functions including but not limited to telephone support, greeting customers in the office and maintaining the office in a professional and presentable manner.

Primary Job Functions include:

- Opening and preparing office for daily work, including opening and distributing mail.
- Providing efficient and courteous customer service, in-person and on the phone.
- Providing telephone support by transferring to correct personnel, making staff aware of incoming calls and taking informative messages if personnel unavailable.
- Balancing cash drawer and preparing bank deposit.
- Becoming familiar with and proficient in agency management system.
- Using and being familiar with Company websites.
- Scanning and filing documents in a timely manner and keeping files up to date.
- Assisting Account Managers and Producers as needed with new business, policy changes and renewal policies.
- Preparing professional letters and documents to be sent to clients.
- Preparing spreadsheets for personal and commercial lines-premium comparison charts with footnotes.
- Referring clients to other LifeStore financial services using our referral system.
- Following and being familiar with Procedures Manual.

Minimum Qualifications

- High School diploma or equivalent.
- Experience in an insurance office environment preferred.
- Strong verbal and written communication skills with attention to detail.
- Good interpersonal and public relations skills.
- Advanced knowledge of computer office programs.

Employees are expected to perform other duties as assigned and directed by management and adhere to all company policies and procedures. Job description and duties may be modified when deemed appropriate by management.