



## Insurance Advisor, Personal Lines Job Description

Internal Title: Insurance Advisor, Personal Lines

Location: Calgary

Department: Underwriting

Reports to: Manager, Underwriting, Personal Lines

### About MMI

We are an ambitious, growing company looking for a candidate with the right training and experience to provide the best service and products to our clients while working in a strong team environment. We offer a competitive compensation and benefits package, a positive culture, along with training and development opportunities.

Our mission and vision are focused on meeting the insurance needs of our clients in the province of Alberta.

To best serve our clients, we hire the best candidate based on their passion, experience, and knowledge. Therefore, our team is strong due to its diversity not necessarily because they share the same faith as many of our clients.

For over 60 years we have insured homes, farms, churches and businesses in the province of Alberta. To learn more about our history, mission, vision and so on, please visit: <https://mmiab.ca/about-mmi/>.

### Job Summary

This is a full-time, permanent position, with salary compensation. We are planning to fill 1 position in Calgary.

An Insurance Advisor reviews and evaluates insurance applications, renewal policies, etc. to determine insurance risks, insurance premiums and extent of insurance coverage according to company policies. They sell Personal Lines automobile, property, and other types of insurance.

The successful candidate will have industry experience in Alberta property, casualty, and automobile personal lines insurance. As part of the underwriting and direct sales team, they will also play a key role in handling our existing Personal Lines business. Duties will include direct customer contact as well as other supporting technical duties, as part of a team.

Calgary:  
300 – 2946 32 Street NE  
Calgary, AB T1Y 6J7

Edmonton:  
4249 97 Street NW  
Edmonton, AB T6E 5Y7

Grande Prairie:  
101 – 9901 97 Avenue  
Grande Prairie, AB T8V 0N2

La Crete:  
9706 100 Street  
La Crete, AB T0H 2H0

Lethbridge:  
1274 3 Avenue S  
Lethbridge, AB T1J 0J9

Toll Free: 1-866-222-6996

Toll Free Fax : 1-866-671-6733



## Job Responsibilities

- Complete Personal Lines applications and endorsements for automobile, fire, liability, property, and other insurance
- Ensure accurate and full completion of application forms, endorsements, and renewal policies to determine insurance risks, insurance premiums, extent of insurance coverage and other conditions of the insurance contract using rate tables and other appropriate documents and reference materials for both home and auto
- Communicate with policyholders to deliver and explain policy coverages and limitations, to analyze their insurance needs and suggest additions or changes
- Conduct oneself as a General Insurance Agent in compliance with government regulations
- Establish client insurance coverage, calculate premiums, and establish method of payment
- Arrange and meet with policyholders in the community for work on their policies
- Order property inspections for new business
- Attend marketing functions to represent MMI, as assigned by Manager
- Participate in webinars and seminars for continuing education hours
- Work in conjunction with other departments, underwriting, accounting, claims, IT, Loss control
- Other duties as assigned

## Knowledge, Skills and Experience

- General Agent Level 2 License by the Alberta Insurance Council
- 3 - 5 years of Personal Lines insurance experience
- Strong sales and communication skills
- Strong customer service skills
- Strong attention to detail
- Demonstrated planning and organizing skills with the ability to prioritize daily tasks
- Flexibility as to types of work assigned and prioritization. Insurance Advisors will at times have serve several people and work on several projects at one time.
- Analytical and problem-solving skills, with the ability to select, justify, and implement best solutions
- Works well with a team, has an ability to assist and support others in achieving work related goals.
- Able to maintain the confidentiality of policyholders, business, staff, and management information. Respects and adheres to the privacy rules.



- On-the-job training and insurance industry courses and training programs are provided and are required for ongoing employment
- Beginner to Intermediate Microsoft Office Skills (Outlook, Word, Excel...)

### Working Conditions or Special Circumstances

- The work schedule is generally Monday-Friday, 7 hours per day, with a one-hour unpaid lunch. However, the Insurance Advisor may have to work odd or long hours at a time to complete special requests or projects, with Branch Manager's approval. Once training and the probation period are completed, there may be an option to work from home some days (hybrid work option).
- Work interruption can be frequent in meeting the needs of clients and fellow team members.
- Physical requirements:
  - Computer use for up to 7 hours per day
  - Sitting for up to 7 hours per day
- Own transportation required
- Occasional travel to client sites required

### How To Apply

To apply for this role, a cover letter and resume should be directed to: [2209@mmiab.ca](mailto:2209@mmiab.ca)

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