



Insurance Advisor Job Description

Internal Title: Insurance Advisor, Personal Lines

Location: La Crete, Alberta

Department: Branch Operations

Reports to: Manager, Personal Lines

Are you looking for a great place to build a career?

- MMI Insurance is an ambitious, growing company looking for people with the desire, ability, and experience to provide excellent customer service and product knowledge to our clients.
- We want people to excel as part of a team with a diversity of skills, talents and backgrounds.
- For over 60 years, MMI Insurance has provided home, auto, farm, church and commercial insurance in the province of Alberta. To learn more about our company and history, please visit: <https://mmiab.ca/about-mmi/>.
- If you share a passion for providing a great customer experience along with offering great products, and feel your talents, skills and knowledge fit one of our positions, we welcome your application!

What Does MMI Offer?

- Competitive salary
- An annual Bonus program
- A group benefits package fully paid for by MMI Insurance
- A group RSP with company providing matching contributions
- Training and career development opportunities
- Work life balance, with a 35-hour work week
- A hybrid work environment for many positions
- Competitive Vacation and Holiday benefits
- Paid Sick time and Personal Days benefits
- Recognition program for employees

Job Summary

- Insurance Advisor, Personal Lines – **La Crete, Alberta**. This is a full-time position with salary compensation, and also offers a location allowance.
- This will be an in-office position requiring attendance at the office. Options for working from home may be possible following successful onboarding to the position.



- As part of the underwriting and direct sales team, the Insurance Advisor will play a key role in handling new and existing Personal Lines business. Duties will include direct customer contact as well as other supporting technical duties, as part of a team.
- The Insurance Advisor will review and evaluate new insurance applications, policy renewals, etc. to determine insurance risks, insurance premiums and appropriate insurance coverage.
- The Insurance Advisor sells Personal Lines automobile, property, and other types of insurance, and as such will require a minimum General Agent Level 1 License from the Alberta Insurance Council.
- The successful candidate will preferably have a minimum of 2 years' industry experience in Alberta property, casualty, and automobile personal lines insurance.

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 automobile.
- 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 payments.
- Order property inspections for new business.
- Attend marketing functions on occasion 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

- A General Agent Level 2 License by the Alberta Insurance Council is preferred, but we will consider a candidate with a Level 1 License and industry experience as below.
- The successful candidate will preferably have a minimum of 2 years' industry experience in Alberta property, casualty, and automobile personal lines insurance.
- 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 have to work with several clients and/or several files 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 the Manager's approval.
- 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 to the office is required.

To apply for this role

Please reply, including a cover letter and resume, to: 2402@mmiab.ca