

ACCOUNT ASSISTANT

Commercial Lines

LloydSadd
INSURANCE BROKERS



EDMONTON & CALGARY | Reporting to: Unit Manager

POSITION OVERVIEW

The Account Assistant position provides centralized administrative support to our production and service teams to allow a seamless execution of our service strategy.

We are looking for a special, passionate administrative professional who can effectively manage their workflow around competing priorities without sacrificing service quality, and deliver consistent, high end results on schedule. The successful candidate will be detail driven, highly organized, and will be passionate about providing exceptional client service at all levels.

RESPONSIBILITIES:

- Communication with clients and issue client certificates of insurance and pink cards
- Process documents including new business, renewals and endorsements within Epic
- Manage incoming and outgoing mail related to the book of business
- Invoice, transact, and execute on premium finance contracts and premium allocations
- Ensure EPIC workflows are followed
- Maintain Claims information in EPIC which includes; input, update and follow-up with client
- Assist in preparing renewals
- A/R processing and billing
- Follow up on outstanding documents from the Insured or Insurer
- Checking insurance documents for accuracy

REQUIREMENTS:

- Insurance or Financial Services experience preferred
- Willing to invest time in extensive training and must be able to obtain your General Insurance License and work towards an industry related professional designation.
- Advanced skills in Outlook, Excel, Word considered an asset
- Experience in EPIC considered an asset

Qualified candidates are invited to email their resume and cover letter to: hr@lloydsadd.com.



Lloyd Sadd is actively committed to support diversity, equity, and inclusion. We serve and recognize and respect human differences and similarities. We value the diversity of people and actively encourage women, indigenous peoples, members of visible minorities, people with disabilities, and lesbian, gay, bisexual, transgender, and queer (LGBTQ2+) persons to apply.