

LIFESTYLE ADVISOR, PERSONAL LINES

LloydSadd
INSURANCE BROKERS

NAVACORD[®]

EDMONTON| Reporting to: Unit Manager

POSITION OVERVIEW

The Lifestyle Advisor is responsible for overall new business production and servicing of a group of high-net-worth clients. These clientele may be principals of Lloyd Sadd commercial accounts or have prominent business and community affiliation. The Lifestyle Advisor will work alongside commercial producers to generate referrals and grow the VIP book of business with a focus on retention of both personal and commercial accounts.

RESPONSIBILITIES:

- Delivering “best in class” additional services to the same assigned group of clients. Additional services would be defined as those “above and beyond” normal transactional services provided to personal lines clients, and may include attendance at insurer inspections, site visits with commercial lines executives, and creating and implementing additional value-added services as appropriate;
- Participation in growth initiatives on behalf of the VIP department;
- Liaise with company underwriters to negotiate best terms for VIP clients;
- Increase revenue by identifying new business opportunities and acquiring new business for the company;
- Ensure that strong, long-term customer relationships are created by providing value added services;
- Maintain a current knowledge base of insurance products and services with various insurance companies, including regular, non-standard, and high-net-worth markets;
- Managing Accounts Receivable of existing client base;
- Working with VIP team members to provide an exceptional customer service experience;

REQUIREMENTS:

- 2 to 4 years of personal lines experience and EPIC brokerage software preferred
- University degree preferred
- Level 2 General Insurance license strongly preferred
- Completed or working towards C.I.P. or C.A.I.B. designation
- Superb interpersonal skills and attention to detail
- Ability to be a self starter with strong written and oral communication skills as well as organizational skills
- Advanced skills in Outlook, Excel, Word

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.