

VENTURE ADVISOR, IBU

LloydSadd
INSURANCE BROKERS

NAVACORD

EDMONTON| Reporting to: Unit Manager

POSITION OVERVIEW

The Venture Advisor is responsible for managing a portfolio of client. Venture Advisors are expert advisors responsible for managing a book of business, servicing clients in a courteous and professional manner, and assisting the producer in obtaining, maintaining, and expanding business. In addition, The Venture Advisor is responsible for the input of new business and marketing documents as well as other administrative duties as required to enhance the team's overall effectiveness.

RESPONSIBILITIES:

- Works closely with the team on all aspects of client service, marketing, and renewal while adhering to Lloyd Sadd's best practices and standard procedures
- Responsible to delegate, develop, and coach the Account Assistant's work to ensure timelines are being met and to review accuracy of documentation
- Manage account documentation (i.e., routine inquiries, quotes, cover notes, statement of values, insurance contracts, endorsements, cancellations, etc.)
- Review client's current coverage and exposures, loss experience and analyze risk to determine the product/service requirements
- Ensure EPIC workflows are followed including maintaining and updating custom forms
- Ensure accurate and timely servicing and billing of accounts
- Actively develop an increased knowledge of related insurance products and client needs
- Participate in training and professional development courses to enhance skills and industry knowledge
- Other duties as assigned

REQUIREMENTS:

- Commercial insurance experience required
- Experience in Professional Liability considered an asset
- Level II license required
- C.I.P. or C.A.I.B. designation(s) preferred
- Solid understanding of policy wordings/coverages
- Strong communication skills with the ability to mentor others
- Strong attention to detail, time management, problem solving and analytical skills
- Advanced skills in Outlook, Excel, Word and EPIC

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.