



ACCOUNT EXECUTIVE

Department: Personal Lines (Calgary, AB)	Status: Permanent, Full-Time
Reports To: Operations Manager	Last Updated: July, 2018
Internal Interactions: Sales Team; Service Team; Commercial Team; DT Management Team; Administrative Staff; Underwriters; QA Specialists	
External Interactions: Industry Contacts; Industry Associations	

Summary

The Account Executive (AE) is one who thrives under pressure, is personable and has an entrepreneurial spirit with a responsibility of providing front-line sales and customer service. An AE is a client-focused team member with a solid understanding of a variety of Personal Lines products, all shapes and sizes. You know how to partner with your clients to assess their needs and you always offer the best solutions for comprehensive coverage. The ideal AE is self-motivated and proactive, intent on providing exceptional day-to-day service to maintain and exceed the reputation and service standards of Dalton Timmis Insurance, a subsidiary of NFP Canada Corp.

Duties & Responsibilities

Client Service, Relationship Building & Collaboration

- Providing advice to clients on insurance matters, products, and coverage's and resolving client concerns with cross selling other lines when appropriate
- Responds to all referrals and client requests in a timely manner as outlined by Dalton Timmis Group (DTG) standards
- Maintains accurate and thorough documentation of all communication with clients, prospects, underwriters, etc., as per DTG standards
- Build and maintain strong relationships with key clients, ensuring understanding of their unique needs; developing and delivering insurance and risk management solutions to meet those needs
- Provide accurate quotes to clients and attempting to secure all lines of business
- Prepare documentation for insurers, complete applications for new clients
- Effective communication with Insurance companies, negotiating with underwriters on clients' behalf, following up with adjusters on claim status
- Follow up on all client accounts to resolve outstanding activities or other items
- Consistent and accurate input of client information and activity
- Meets sales targets
- Provides expert advice, recommendations and counseling to clients about their personal insurance coverage geared to their unique needs and exposures
- Attend trade shows and various marketing events as required

Key Skills & Qualifications

- Post-secondary education, or related job experience is preferred
- 1+ years Personal Insurance experience preferred



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- Valid Level 1 Licence
 - Passion for client care; committed to delivering a top-notch client experience
 - Possesses and displays professional presentation and demeanour and a solid understanding of the Personal insurance business in a service-focused environment
 - Self-managing with strong analytical, organizational and time management skills
 - Excellent interpersonal, verbal and written communication skills
 - Strong team player—ability to adapt to and collaborate with various team members and individuals
 - Ability to multi-task in a fast-paced environment while staying focused on priorities
 - Proficient in the Microsoft Office suite of products, experience with EPIC and industry software and rating engines
 - Professional, reliable and courteous to clients and colleagues

It is Dalton Timmis' policy to give preference to qualified internal applicants.

Dalton Timmis welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

Please submit all applications to humanresourcescanada@nfp.com.

Please note that due to the volume of applications received; only those selected for interview will be contacted.