

Job Title: Risk Advisor

Department: Personal Lines

At Leavitt Elite Insurance Advisors (LEIA), we believe peace of mind comes from achieving your desired quality of life, reaching financial success, and preparing for life's uncertainties. We expect excellence by applying our best attitude, desire, and effort to all we do. We deliver on promises and go the extra mile to meet and exceed expectations. We encourage a relentless commitment to education and development, innovative creativity, and forward-looking collaboration to deliver cutting edge solutions to those we serve. We hire skilled, motivated, and happy people who work together in an atmosphere of teamwork, loyalty, and mutual respect. We build relationships and earn trust by never compromising our honesty or integrity for short- or long-term gain. Doing the right thing is always the right thing.

SUMMARY

The Personal Lines Risk Advisor performs duties independently with minimal supervision and operates from established directions and instruction. The Advisor will identify clients' hazards, risk and insurance needs as it relates to personal lines insurance needs of prospect or client. This position exists to promote the Agency and to increase the Personal Lines sales production for the Advisor as well as the Agency. The Advisor is responsible for risk identification and service approaches for the organizations' book of business, while mitigating risks for clients in a manner that establishes positive relationships with customers and improves the retention and growth of the agency's book of business.

RESPONSIBILITIES AND DUTIES

- Actively participates in the retention and growth of Agency book of business by meeting assigned sales goals
- Follows agency procedures for the input, servicing, and maintenance of:
 - New Business
 - Renewals
 - Endorsements
 - Cancellations
 - Billing/Financing
 - Certificates/Schedules of Insurance
 - Payments
 - Quotes
 - Claims
- Reviews accounts to identify and target new business opportunities for existing clients
- Consults with clients to answer queries on subjects such as exposure, coverage, and risk calculations to educate clients on the varied topics regarding risk management and insurance needs in a timely manner
- Recommends insurance coverages to mitigate client's risk exposure
- Meet agency directed sales goals by the marketing of Personal Lines products through the establishment of relationships, centers of influence and marketing of Agency
- Maintains, identifies, and quantifies risks for agency book of business
- Attend regular scheduled meetings with Personal Lines VP and Agency
- Provides weekly activity reports to VP Personal Lines Sales

- Stays up to date on the use of the latest models or techniques used to provide cutting-edge services to carriers and Agency.
- Stays up to date with industry knowledge and regulations
- Represents Agency in a respectful and dignified manner
- Maintain all necessary licenses and applicable continuing education requirements
- Fulfills other duties as assigned by Executive Leadership team

REQUIREMENTS:

- Full-time position (37.5 hours a week)
- Minimum 3 years insurance sales and service experience required
- Adheres to the Leavitt Elite Governing Principles
- Adheres to Company Policies and Procedures as set forth

QUALIFICATIONS:

- Superior sales and customer service experience required
- Superior communication skills both verbal and written
- Strong attention to detail and organizational skills
- Possesses time management and the ability to prioritize
- Intermediate to advanced level consulting and understanding of advanced risk management concepts.
- Ability to quickly establish credibility and rapport with all others
- Experience working in a collaborative environment
- Critical thinking and influencing skills that effectively drive business needs.
- Negotiating change to achieve optimal outcomes.
- Ability to give and receive coaching and feedback
- Ability to multi-task and function in a fast-paced environment
- Knowledge and use of Microsoft Office, Word and Excel
- AMS360 and Agency Zoom knowledge preferred but not required

EDUCATION:

- High school diploma or general education degree (GED)
- NC Personal Lines or Property & Casualty License required (P&C preferred)
- NC Life and Health license optional
- Nonresident licensing may be required

SUPERVISORY RESPONSIBILITIES

There is no direct supervision of other employees required for this position.

WE OFFER:

- Affordable Benefits: Medical, Dental, Vision, Life, Long-Term and Short-Term Disability
- Matching 401K plan
- Paid time off (vacation, sick leave, and holidays)
- Paid continuing education and licensing renewals
- Exciting growth opportunities