

# PEARSON DUNN

**Job Title:** Client Associate

**Date:** 2019

**Location:** Hamilton, ON

**Report To:** Vice President of Branch Operations

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Pearson Dunn Insurance Inc. is an independent brokerage offering a full range of insurance and risk management services to individual and business clients. Our parent company, Jones Brown Inc. is a Canadian insurance brokerage and strategic consultancy. Founded in 1997, Jones Brown is distinguished by its peerless client service, its best-in-class team of experts, and its singular commitment to providing innovative, tailored solutions for complex problems.

Pearson Dunn is proud to be part of Arthur J. Gallagher Canada Limited.

## Position Summary

Reporting to the VP of Branch Operations, the Client Associate will provide technical and administrative support to the Commercial department. The role supports and interacts with Client Executives and Client Managers, in a team based environment, to ensure that our clients receive efficient, high quality service.

## Duties & Responsibilities

### 1. Providing Administrative Support to the Office

- Office administration and support, including answering and directing incoming calls, reception for visitors, and managing mail/courier pick-ups and deliveries.

### 2. Providing Administrative Support to the Commercial Team on Existing Clients. Activities will include:

- Preparing evidence of insurance for clients such as certificates of insurance, binders, cover notes, endorsements and other forms of coverage confirmations;
- Preparing and issuing invoices, premium allocations and premium financing contracts for clients as necessary;
- Preparing underwriting submissions for new and existing clients for insurance marketing purposes;
- Helping to handle daily administration including following up on documentation requests, conducting policy wording reviews and issuing policy documentation to clients;
- Delivering superior customer service while adhering to guidelines and workflows as set out by the commercial team; and
- Working closely with our Client Manager and Client Executive to support them in all aspects of client service.

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### 3. Supporting New Business Initiatives. Activities will include:

- Helping to prepare presentations, reports and other “pitch” documents to support discussions with prospective clients on new business; and
- Assisting team members with various efforts to identify and organize new business prospects.

### 4. Engage in Training

- Attending broker training seminars with the insurers to learn about specific coverage lines and insurance products including Property/Casualty, Crime/Fidelity, Professional Liability and Directors & Officers Liability Insurance
- Receiving internal training on client management systems, most notably “TAM”; and
- With guidance from colleagues, receiving direction and training on the insurance placement process, identifying risk exposures, insurance product features and insurance market workings through active involvement in supporting client relationships.

### The successful candidate will possess the following qualifications:

- Ability to multi task and manage competing priorities
- Quick learner, detail oriented and highly organized
- Team player, eager to learn new skills
- Excellent verbal and written communication skills
- Post-secondary degree/diploma preferred
- Proficiency with Microsoft Office required, experience with TAM broker management system would be an asset
- Previous insurance experience and RIBO licence preferred, willingness to acquire the license is required.

The position offers a competitive employment package and compensation commensurate with experience. The position will start as soon as possible.

Kindly forward your resume and cover letter via email to [Mark\\_Thom@ajg.com](mailto:Mark_Thom@ajg.com) using the subject line “**Client Associate - PDI**”.

For more information, check us out online at [www.pearsondunn.com](http://www.pearsondunn.com)