

Position Description	
Position Title	Assistant Account Executive
Employment Status	Permanent
Business Hours	8:30 – 5:00 (flexible and hybrid work arrangements available)
Location	Level 1, Hamilton House 46-54 Charles Street, Launceston.
Award & Classification	Banking, Finance and Insurance Award 2020
Reports To	HR Manager
Direct Reports	Nil

About Us

Who we are:

McKillop Insurance Brokers have been around since 1975 and are part of the Steadfast Broker Network. We strive to understand the needs of each individual client, looking at the whole solution required and tailoring insurance to suit.

What we do:

We support business and individual clients with a tailored, simple and stress free approach. Whether it be for commercial or personal insurance cover, our focus is on delivering the right advice and getting the best outcomes for our clients.

Our values:

We are people focused, we support our clients and team with professionalism, warmth and integrity. Understanding and approachable we aim to provide service excellence to our clients with each and every interaction and support our team to grow and flourish in their roles.

Position Purpose

The Assistant Account Executive provides comprehensive support to the insurance broking team through the efficient processing of new business, policy endorsements, renewals, and claims. This role ensures exceptional customer service delivery to clients while maintaining compliance with industry regulations and supporting the operational objectives of McKillop Insurance Brokers.

Key Responsibilities

Client Service

- Answer incoming telephone calls and handle client queries within scope of role, directing complex matters to appropriate staff members
- Provide a friendly, professional, and welcoming experience to all clients and prospective clients, both in person and via telephone
- Attend to front counter payments and enquiries with courtesy and efficiency
- Respond promptly to enquiries and action requests from Account Executives and Management

Insurance Operations and Administration

- Process new business applications, endorsements and amendments with accuracy and attention to detail
- Prepare and follow up on quotations and renewals in a timely manner
- Process policy amendments, endorsements and cancellations in accordance with agreed objectives
- Act on behalf of the client in the management and settlement of claims ensuring a timely and favourable outcome where possible
- Maintain accurate client records and policy documentation updating as needed and in line with McKillops One Best Way
- Prepare renewal documentation and presentations for clients aligned with McKillops policy and procedural framework
- Liaise with insurers on claims and policy queries
- Update claims status reports within benchmark days

Team Collaboration

- Assist other Account Executives and team members as needed
- Collaborate effectively with colleagues to accomplish McKillops goals and deliver excellent service to our clients
- Contribute positively to team discussions, respect and value the contribution of all team members

Administration and Compliance

- Ensure all activities comply with RG146 requirements and McKillops policies and procedures
- Maintain accurate records of client interactions and transactions ensuring these are stored in the relevant management system
- Support audit and compliance activities as required

Qualifications, Skills and Experience

What you'll need

- ANZIIIF Tier 1 accreditation, or progress towards
- Great communication skills both written and verbal with the ability to speak confidently with clients at all levels
- General insurance broking experience – ideally across retail and wholesale products
- Excellent attention to detail, strong accuracy and the ability to manage time effectively in a busy environment
- Ability to use initiative, be results driven and motivated by a genuine desire to achieve the best outcomes for McKillops and our valued clients
- Experience with Sunrise/Insurer Portals and MS Office

Desirable

- Experience with Insight

Working with McKillops

At McKillops we pride ourselves on supporting our people to grow and provide a fun environment where you will enjoy:

- ✓ Professional development opportunities and career pathway progression
- ✓ Regular team building activities
- ✓ Flexible working arrangements including hybrid work and a flex day
- ✓ EAP
- ✓ Enjoy discounts through the Steadfast broker network including health insurance and travel insurance to name a few

Success Indicators

What Success Looks Like

Client Service and Insurance Operations	✓ Claims are lodged promptly and accurately ✓ Regular communication, well informed of changes and updates ✓ Activities undertaken to a consistently high standard ✓ New Business quoted within 24 hours ✓ Renewals minimum 21 days in advance ✓ Retention rate within own portfolio
Teamwork	✓ Collaborating where possible and sharing the load when you can ✓ Supporting others to succeed, demonstrating the principle that Together Everyone Achieves More ✓ Reliable, consistent, accountable, approachable