

## JOB DESCRIPTION

**Job Title:** Assistant Insurance Producer  
**Company:** Watersound Insurance Agency, in association with Gallagher  
**Reports to:** President & CEO  
**Direct Reports:** None  
**Date Prepared:** March 2021

<b>Job Summary</b>	Watersound Insurance Agency, in association with The St. Joe Company and Gallagher, is looking for a dedicated professional to join our sales team and help grow our private client and commercial lines for our book of business.
<b>Essential Functions</b>	<ol style="list-style-type: none"><li>1. Provide administrative support to the Insurance Producer on a day-to-day basis.</li><li>2. Collect new account information and enter it into our Agency Management System.</li><li>3. Complete insurance applications, prepare proposals etc. and manage customer files.</li><li>4. Follow up with clients and insurance companies on proposal and quotes and provide additional information where needed.</li><li>5. Be prepared to take many requests throughout the workday and be able to follow directions very closely with minimal supervision.</li><li>6. Post close follow up with customers and insurance companies.</li><li>7. Receive calls from clients, and process customer service requests.</li></ol>
<b>Education and Experience</b>	<ul style="list-style-type: none"><li>• Bachelor's degree preferred; Degree in Risk Management/Insurance or Business related degree is a plus.</li><li>• 1 year related experience is a plus.</li></ul>
<b>Knowledge, Skills, Abilities</b>	<ul style="list-style-type: none"><li>• Professional designation may be preferred, including CEBS, CPCU, CIC, or ARM.</li><li>• Effective communication, interpersonal and organizational skills in person and on the phone.</li><li>• Attention to detail and the ability to multitask.</li><li>• Proficient with Microsoft Excel Word &amp; Outlook and Acrobat.</li></ul>
<b>Physical Demands</b>	<ul style="list-style-type: none"><li>• Ability to operate normal office equipment.</li><li>• Extensive use of computer.</li><li>• Ability to operate a motor vehicle.</li><li>• Ability to sit for extended periods of time.</li><li>• Ability to lift up to 15 lbs.</li></ul>
<b>Working Conditions</b>	Normal office environment, with occasional travel to other office locations.

*The above statements are intended to describe the general nature and level of work being performed and are not an exclusive list of all duties and responsibilities. The Company reserves the right to amend and change responsibilities to meet business and organizational needs.*