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|---------------------------|-----------------------------|
| <b>JOB TITLE:</b>         | <b>PERSONAL LINES AGENT</b> |
| <b>REPORTS TO:</b>        | <b>VICE PRESIDENT</b>       |
| <b>FLSA STATUS:</b>       | <b>EXEMPT</b>               |
| <b>SUPERVISES OTHERS:</b> | <b>NO</b>                   |
| <b>LOCATION:</b>          | <b>FOREST CITY, IA</b>      |

## **OBJECTIVE/FUNCTION**

The personal lines agent will promote sales of new and existing business. Through exemplary customer service skills, the personal lines agent will nurture new business leads and strengthen existing customer relationships. This position's responsibilities include frequent communication with prospects and customers, quoting and cross-selling, and insurance product knowledge.

## **DUTIES AND RESPONSIBILITIES**

- Ensure customer service provided is consistent with the company's core vision.
- Quote and sell products in accordance with underwriting and rating procedures.
- Review and execute renewals, endorsements, cancellations, and payments according to company workflows.
- Maintain confidentiality of clients' personal information.
- Ensure communication and collaboration with coworkers is harmonious.
- Gain and maintain state insurance licensing through testing and continuing education.
- Attend RV rallies and present at seminars as necessary.
- Other duties and responsibilities as needed.

## **PHYSICAL REQUIREMENTS**

Must be able to drive, stand, sit and stoop for extended periods of time. Must be able to lift or reach arms over head or below waist. Must be able to lift, hold or carry items weighing up to 50 pounds unassisted. Must be able to see, hear and speak with or without accommodation.

## **ENVIRONMENTAL REQUIREMENTS**

Must be able to work in well-lighted or dim-lighted office environment. Temperature-controlled area air conditioned or heated offices at reasonable temperatures.

## **EDUCATION AND EXPERIENCE:**

High School graduate or equivalent preferred  
Personal Lines Insurance License  
Competent in use of Word, Excel, and Outlook  
Applied Epic experience a plus

## **PERSONALITY/OTHER:**

Must be an excellent presenter by articulating in a positive professional manner. Must be confident and effective communicator. Work well under pressure and time deadlines. Ability to work in a fast-paced environment. Must have a sense of urgency and ability to prioritize quickly and efficiently. Must be able to work well under a team environment or work independently as needed.

Signed and Acknowledged \_\_\_\_\_

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Signature

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Print Name