



Insurance Associate

Summary & Objective:

Davidson & Associates is looking for the next great addition to our team. Our Insurance Associate provides outstanding customer support to existing and new personal or business clients in a collaborative work environment. Inside sales is a component of the position, but cold calling is not expected; we are a referral agency. If you enjoy learning and have exceptional customer service, teamwork and communication skills-- we would like to hear from you!

Essential Functions:

- Daily interaction with team members, clients and insurance companies
- Develop appropriate risk management programs to solve the client's needs determined through exposure/risk analysis
- Provide consistent and quality service of accounts by responding to client inquires including, but not limited to the following:
 - Provides claims assistance as needed
 - Requests policy changes and corrections as needed, and processes the policy endorsements when received
 - Manages renewal process on existing clients
 - Write additional policies for existing clients
- Enter and maintain complete and accurate information in agency management system
- Onboarding new clients with mobile apps and procedures
- Manage client relationship to maintain high account retention rate
- Other duties as assigned

Competencies:

- Strong organizational and time management skills
- Ability to effectively communicate; both written and verbal format
- Proficient knowledge and understanding of Microsoft Office applications
- Familiarity with an insurance agency management system (we use EPIC) is a plus but is not required
- Responsive, welcoming and effective customer service skills; relationship builder
- One to two years of prior insurance industry/personal lines experience is desirable
- Inside sales experience preferred
- Proactive account management style

A few words about Insurance Licensing:

The position holder will need a **WA Property and Casualty license** or ability to obtain in a timely manner. (License fee reimbursement upon successful completion is a Company benefit.)

What can Davidson offer you?

- A competitive compensation package including excellent benefits (i.e., 401k match, health, life/disability insurance)
- Career growth opportunities
- A fantastic office and location! Our office is centrally located in downtown **Vancouver, WA**—a short walk to restaurants, parks, coffee shops and trails
- Work that is fast-paced and goal-oriented
- A dynamic team that is supportive, friendly and inclusive
- A Company culture of giving back to the community; our agency is supportive of employee community volunteer efforts

Who is Davidson & Associates Insurance Agency?

As professional advisors in an independent agency, we offer sound solutions and access to a wide variety of policies that best meet our valued Clients' needs. We have been honored as a Best Practices Agency by IIABA (Independent Insurance Agents and Brokers of America, Inc.) and received the Best of Clark County in 2018 honor from The Columbian.

What is it like to work at Davidson?

Our Company culture is one of:

- The highest ethics
- Client focus
- Professionalism
- Proactive service to clients, partners and the community through gifts and actions
- Outstanding community reputation through integrity and service
- As enthusiastic contributors within our community, Davidson employees get involved

If you are interested in this outstanding opportunity, please e-mail the following to Emily McCoy at [emily@davidsoninsurance.com](mailto:emily@ davidsoninsurance.com)

- Cover letter
- Résumé