

Job Title: Agency Support Specialist
Department: Personal Lines

At Leavitt Elite Insurance Advisors (LEIA), we believe peace of mind comes from achieving your desired quality of life, reaching financial success, and preparing for life's uncertainties. We expect excellence by applying our best attitude, desire, and effort to all we do. We deliver on promises and go the extra mile to meet and exceed expectations. We encourage a relentless commitment to education and development, innovative creativity, and forward-looking collaboration to deliver cutting edge solutions to those we serve. We hire skilled, motivated, and happy people who work together in an atmosphere of teamwork, loyalty and mutual respect. We build relationships and earn trust by never compromising our honesty or integrity for short- or long-term gain. Doing the right thing is always the right thing.

SUMMARY

The Agency Support Specialist position will provide support to the customer and the sales and servicing staff of all Personal and Commercial Insurance departments. Answering incoming phone calls for all LEIA locations and promptly distributing those calls in a professional manner. Assisting with payments, billing inquiries, verifying account information, claims gathering, and generating appropriate documents where required.

RESPONSIBILITIES AND DUTIES:

- Gatekeeper of the LEIA phone queue for answering all incoming calls of all office locations.
- Assist and direct walk-in clients for their personal lines business inquiries.
- Process payments & answer billing questions for all offices.
- Verify, update, and maintain email addresses & phone numbers in the Agency Management System and carrier sites.
- Gather and process lienholder and mortgagee updates.
- Prepare ID cards and proof of insurance as requested by clients.
- Process tow bill reimbursements for clients.
- Provides support for Personal Lines Account Managers as directed by the Team Leader for:
 - Gathering quote information from clients utilizing quote forms.
 - Preparing FS1 and DL123 forms.
 - Claim gathering and assists with filing the loss with carriers.
- Mail distribution when required – internal and external.
- Responsible for running daily remittance of the office.
- Provides support to all teammates where needed.
- Performs special assignments as requested by management.
- Attends carrier training sessions as directed by the Agency (zoom or in person)
- Attends a weekly meeting with your team conducted by your Team Leader.
- Promotes and enhances the fiduciary responsibilities and reputation of the Agency.
- Ensures security of all client's information and agency proprietary information.

REQUIREMENTS:

- Full-time position
- Adheres to the Leavitt Elite Governing Principles
- Adheres to Company Policies and Procedures as set forth

CERTIFICATES, LICENSES, REGISTRATIONS

- License: Have a valid, in force driver's license with an MVR acceptable to the agency.
- NC Personal Lines or Property & Casualty Resident License preferred but not required.
- Continuing Education: Attend insurance classes that will increase understanding of the industry and satisfy state licensing CE requirements when applicable. Participate in company training classes as required.