



## Job Description

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|----------------------|--------------------------------|----------------------------|--------------------|
| <b>Job Title</b>     | Underwriter Assistant          | <b>Original Date</b>       | September 2016     |
| <b>Department</b>    | Farm & Ranch                   | <b>Revision Date</b>       | December 2022      |
| <b>Reports to</b>    | Sales and Underwriting Manager | <b>Position Type</b>       | Full-time/Salary   |
| <b>Exempt Status</b> | Hourly                         | <b>Commissionable - No</b> | <b>Bonus - Yes</b> |

**JOB SUMMARY:** As a member of the underwriting team, the Assistant Underwriter is responsible for supporting new business and renewal underwriters in diverse day to day activities. This role actively engages our agents regarding current policies to ensure they meet Concorde and carrier standards.

### CORE VALUE BEHAVIORS TO MEASURE PERFORMANCE

Communicates Effectively, Demonstrates Teamwork, Builds and Maintains Relationships, Desire for Professional & Personal Growth, Demonstrates Commitment to Excellence and Servant Leadership

### KEY RESPONSIBILITIES:

- Process endorsements in accordance with time standards for our Trusted Partners.
- Screen renewals to obtain needed file information for quoting prior to the Underwriter starting the quote.
- Write out and/or Follow-up on additional information requests for renewal quotes and endorsements as needed.
- Act as the phone que triage person to determine who can help the caller.
- Handle other inquiries from our Trusted Partners in a timely manner.
- May help with quoting New Business and/or Renewals depending on skill set.
- Other duties as assigned.

### EDUCATION, EXPERIENCE, LICENSURE & CERTIFICATION:

- High School, GED, or some college desired.
- Experience working in an office at the direction of others at a high pace.
- Minimum of 1 years of underwriting or insurance industry experience preferred.
- Any Farm & Ranch insurance experience preferred and is a bonus.

### KNOWLEDGE, SKILLS & ABILITIES:

- Curious and likes gathering multiple sources of informational data to help Underwriters make complex decisions.
- Meticulous with details when entering and extracting data.
- Highly motivated and results driven with the ability to follow multiple projects from start to finish.
- Strong organizational, prioritization, and time management skills.
- Ability to work independently and efficiently.
- Track record of meeting deadlines or meeting them early.
- Desire to learn the insurance business.

### SYSTEMS:

- Microsoft Office 365
- VoIP Phone System
- ALIS Agency Management System
- Carrier Websites
- CGA Website/Portal including company online rating systems

**SUPERVISORY RESPONSIBILITY:** This position has no supervisory responsibilities.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk or hear and must have the ability to see details at close range. The

employee frequently is required to sit for extended periods of time and will require the use of hands and fingers to handle or feel; move about the office/facility. Some light physical effort is required.

**TRAVEL:** Some travel is expected for this position to attend company meetings, conventions, carrier/agency visits or trainings.

**WORK CONDITIONS AND WORK ENVIRONMENT:** This job operates in a professional office environment or home office setting. Work is performed in a temperature-controlled, non-smoking office. The noise level in the work environment is usually quiet. This role routinely uses standard office equipment such as computers, phones, printers/photocopiers, scanners, and fax machines.

**GENERAL NOTES:** This job description is not intended to be all-inclusive, additional details will be specified by the manager/supervisor. The employee will also perform other reasonable business duties as assigned by the manager/supervisor. Management reserves the right to change this job description, job responsibilities, duties, and working hours as needs prevail, with or without notice.

If requested in accordance with applicable law, the Company provides reasonable accommodation to known physical and mental limitations of an otherwise qualified employee with a disability to allow him/her to perform essential functions of the job unless the accommodation would impose an undue hardship on the Company.

The Company is an at-will employer. This job description is a guideline and does not constitute a written or implied employment contract.

I have read and understand this job description. I agree to accept the responsibilities and duties as outlined.

#### **Employee Acceptance**