##

## Position Description

**Position Title:** Administration Assistant

**Position Type:** Full-time

**Date Reviewed:** March 2021

**Background**

Keystone Underwriting Pty Ltd is an underwriting agency that operates as a Lloyds cover holder and holds its own AFS licence.

This role has authority to issue quotes and bind policies on behalf of the Lloyds insurer and in accordance with agreed guidelines.

**Hours of Work**

38 hours per week plus any additional hours Keystone reasonably requires the Employee to work

**Reporting Relationships**

Reports to: Managing Director Reports to this role: Nil

**Primary Role**

Managing timely policy renewals and new business quotes to brokers.

**Skills, Knowledge, Abilities and Attitude Required**

* Basic understanding of insurance concepts and requirements.
* Able to rate basic quotes.
* Some experience using underwriting systems, in particular, Underwriter Central and KeyQuote.
* Organised.
* Service oriented and helpful attitude.

**Duties and Responsibilities**

| **Key Result Area** | **Major Activities** |
| --- | --- |
| **Customer Service** | * Adhere to service standard and principles
* Ensure excellent service is provided to brokers
* Answer broker enquiries
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| **Quality** | * Adhere to quality policy and principles
* Maintain current knowledge of processes
 |
| **Teamwork** | * Work effectively with team to accomplish organisational goals
* Consult with colleagues and underwriters to meet clients’ needs
* Report work status as required
* Take actions that respect the needs and contributions of others
* Contribute to, accept and assist in the implementation of the consensus
 |
| **Underwriting**  | * Ensure Keystone’s needs are protected
* Ensure Underwriters needs are protected
* Ensure broker needs are protected
* Maintain personal and telephone contact with brokers
* Adhere to underwriting procedures
* Prepare and communicate quotations
* Prepare and communicate bindings
* Prepare and communicate mid-term adjustments/endorsements
* Follow up renewals
* Lapse policy if renewal not required
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| **Debtors** | * Follow up outstanding debtors
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| **Education / Compliance** | * Maintain technical and practical insurance knowledge
* Conduct all activities in compliance with relevant Acts and ethical standards
* Maintain knowledge of client industries, businesses and risks
* Attend training courses and industry seminars
 |
| **Management Support** | * Assist and support management with specific tasks or projects as directed
 |

Employee Signature:

Printed Name:

Date: