

## **Account Manager (Bilingual) – Private Client**

**Company Name:** Halpenny Insurance Brokers Ltd.

**Location:** Ottawa or Toronto

**Salary:** \$55,000-\$70,000 per year

## **About Halpenny**

Halpenny Insurance Brokers Ltd is the largest independent insurance broker in Ottawa with roots since 1912. We take pride in providing advice and personalized service to our valued clients, protecting what matters most to them, and offering comprehensive insurance coverage that suits their unique requirements. As we continue to grow, we are looking for reliable, driven, customer-centric, and team-oriented individuals to join our expanding team.

## **Job Description**

A Private Client Account Manager is responsible for managing client accounts and maintaining and managing new and existing relationships with insurance companies and clients.

Your primary role is to ensure client satisfaction while growing the book of business through cross-selling opportunities, selling new group and affinity policies and promoting retention by providing excellent customer service through effectively addressing insurance needs. You will play an integral role in providing excellent customer service throughout the entire customer journey.

## **Responsibilities**

- Building and maintaining strong relationships with clients to understand their insurance requirements
- Prepare and present clear and concise insurance quotes to new prospects and existing clients, fully explaining the benefits and terms
- Assisting clients with policy renewals, modifications, and claims processing
- Analyzing client accounts to identify potential coverage gaps and recommend appropriate coverage solutions
- Upselling valuable optional coverages
- Researching and keeping up to date with industry trends, regulations, and changes in insurance products
- Maintain accurate and organized client records and documentation in compliance with regulatory standards.
- Resolving client inquiries, concerns, and complaints in a timely and professional manner

- Collaborating with other internal departments, such as Claims and Underwriting, to provide client solutions

## **Requirements**

- Bachelor's degree is an asset
- RIBO Licensed
- Relevant experience in the insurance industry, preferably in an Account Manager role
- Strong knowledge of Personal Insurance products, policies and coverage options
- Excellent communication and interpersonal skills to build and maintain client relationships
- Ability to analyze client needs and recommend solutions
- Attention to detail and strong organizational skills
- Proficiency in using insurance management software and computer systems
- Bilingualism is required

## **Benefits**

Halpenny Insurance Brokers Ltd. is proud to offer a wide array of benefits which include but are not limited to:

- Competitive salary with commission opportunities
- Comprehensive group benefits, including health, dental, a wellness savings account, and Group RRSP
- Personal and professional development programs, on-demand e-learning, and tuition reimbursement
- Flexible personal days for illness, emergencies, or family needs
- Collaborative and inclusive work environment with supportive management
- Educational assistance for industry designations
- Career growth opportunities in private client, commercial and benefits divisions
- Hybrid working arrangements to support work-life balance

## **How to Apply**

If you believe you are the ideal candidate for this position and have relevant experience, we would be delighted to hear from you! To apply, please send your updated resume and a cover letter outlining your qualifications and why you'd be a great fit for this role to [careers@halpenny.com](mailto:careers@halpenny.com). We look forward to receiving your application!