

## **Broker Assistant – Commercial Lines**

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

**Location:** Ottawa or Toronto

**Salary:** \$45,000-\$55,000 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 Commercial Lines Broker Assistant provides efficient and detail-oriented support to our Commercial Broking team. The ideal candidate will assist in managing client accounts, creating certificates of insurance, binders and invoices, maintaining accurate records, preparing client communications, all while ensuring a high level of service and communication. Commercial Broker Assistants play a key role in streamlining our operations and contributing to the growth of the brokerage.

### **Responsibilities**

- Review insurance documents for accurate records
- Prepare client insurance binders, certificates of insurance, invoices and other related documents.
- Prepare correspondence, including emails and handle general phone inquiries.
- Manage and organize the filing of client records, insurance policies, claims, and other related documents.
- Answering a multi-line phone system and directing calls
- Transacting policies in our business management system and ensuring accurate recording of premiums and commissions

## Requirements

- RIBO License
- College diploma, University degree or equivalent experience (preferred)
- Excellent communication and interpersonal skills
- Strong organizational skills with a high degree of attention to detail
- Ability to effectively prioritize and meet deadlines
- Ability to work independently, manage time effectively
- Strong knowledge of Microsoft Office suite of programs
- Bilingualism (English and French) is an asset

## Benefits:

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

- Competitive Salary and Bonus Structure
- Employee Group Benefits, including Health & Dental, a wellness savings account, Group RRSP, etc.
- Paid and Unpaid time off
- Growth opportunities in multiple divisions
- An established brand and clientele within our community
- A collaborative working environment including a modern office space – functional and client-friendly
- Continuing Educational assistance for industry designations – Support to obtain your CIP and other industry designations
- Collaborative support and mentorship – investing in your development
- Supportive Management – Helping you develop
- Proven processes and deliverables – customized by our team of experts
- An Inclusive and Diverse culture

## 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!