



Account Manager (Bilingual) – Private Client

Location: Ontario (Hybrid in Ottawa or Toronto | Remote Elsewhere in Ontario)

Join Halpenny – Proudly Independent and Canadian Owned

At Halpenny Insurance Brokers, we've been helping clients protect what matters most since 1912. As Ottawa's largest independent, Canadian owned insurance brokerage, we combine the strength and stability of an established national organization with the personalized service and local expertise our clients value.

We're growing and looking for a **Bilingual Private Client Account Manager** who is passionate about building client relationships, delivering exceptional service, and identifying opportunities to help individuals and families enhance their insurance protection.

This is an opportunity to join a collaborative, supportive team where you'll enjoy competitive compensation, flexible work arrangements, professional development opportunities, and clear pathways for career growth.

About the Role

As a Private Client Account Manager, you'll manage and grow a portfolio of French and English-speaking clients by providing trusted insurance advice, delivering outstanding service, and identifying opportunities to expand coverage solutions that meet their evolving needs. You will manage and grow a portfolio of High-Net Worth and VIP clientele while also participating in the growth of your book through inside sales opportunities.

Key Responsibilities

- Manage a portfolio of French and English-speaking personal insurance clients
- Build strong client relationships and provide professional insurance advice tailored to individual needs
- Generate new business opportunities through cross-selling, affinity programs, and additional coverage recommendations
- Prepare and deliver insurance quotations to prospective and existing clients
- Support policy renewals, endorsements, and claims inquiries
- Identify coverage gaps and recommend appropriate insurance solutions
- Promote client retention through proactive account management and exceptional service
- Maintain accurate client records and documentation in compliance with regulatory requirements
- Collaborate with insurance carriers and internal teams to deliver effective client solutions

What You'll Bring

Required Qualifications

- Valid RIBO licence
- Fluency in both French and English (written and verbal)
- Minimum two years in personal insurance or a related client facing insurance role
- Strong knowledge of personal insurance products, coverages, and policy administration
- Proven ability to assess client needs and recommend appropriate solutions
- Excellent communication, relationship-building, and problem-solving skills
- Strong organizational skills and attention to detail
- Experience using insurance broker management systems and related technologies

Preferred Qualifications

- Experience managing a book of business centered around high net worth clients
- Post-secondary education in business, insurance, or a related field

Why Join Halpenny?

- Competitive salary of **\$55,000-\$70,000**, plus commission opportunities
- Hybrid work options in Ottawa or Toronto, with remote opportunities elsewhere in Ontario
- Comprehensive health and dental benefits and a Wellness Spending Account
- Group RRSP with employer matching
- Tuition reimbursement options and support for professional/industry designations
- On-demand learning through IBO and professional development opportunities
- Flexible personal days for illness, emergencies, or family needs
- Collaborative, inclusive, and supportive workplace culture
- Career growth opportunities across our Private Client, Commercial Insurance, and Employee Benefits divisions

Interested in joining our team? Apply Today

Please submit your resume and a brief cover letter outlining your qualifications and interest in the role to: careers@halpenny.com

Halpenny is committed to equal opportunity employment. Accommodations are available upon request for applicants with disabilities throughout the recruitment and selection process.

We thank all applicants for their interest. Only those selected for an interview will be contacted.