



Williamson Insurance & Investments, LLC

POSITION DESCRIPTION

Position Title **Commercial Lines Insurance Agent**

POSITION SUMMARY

Outside Sales Representative

DUTIES & RESPONSIBILITIES

The description below is intended to depict the general content & requirements for the performance of this position. It is not to be construed as an exhaustive statement of duties, responsibilities or requirements.

1. Actively grow relationships with business owners & decision makers in the community
2. Continually grow knowledge & expertise of our carrier appetites & coverage options
3. Gather information from potential clients to accurately rate products & policies through multiple systems & carriers
4. Work with underwriters from many companies to find the best fit for clients & potential clients
5. Find new & creative ways to separate yourself from others in the industry
6. Meet prospecting & production goals on a regular basis
7. Although commercial lines will be priority, agent will have access to all our personal lines products & carriers
8. Use personal network as well as resources provided by agency to find quality clientele
9. Present coverage proposals to business owners & decision makers to secure & close new accounts

MINIMUM POSITION QUALIFICATIONS

- Property & Casualty Insurance License
- Life & Health Insurance License (preferred, not required)
- Bachelor's Degree or relevant work experience

KNOWLEDGE & SKILLS

- Ability to work closely & cooperatively with other professionals on the team to ensure an atmosphere of continual growth of our agency
- Capacity to be flexible regarding job duties, scheduling, & time management due to varied functions within the role
- Ability to organize & prioritize multiple tasks
- Effective verbal & written communication skills along with proper telephone etiquette
- Perform in a tactful & professional manner



WORKING CONDITIONS & PHYSICAL REQUIREMENTS

Must possess socio-economic & cultural sensitivity. Must have visual acuity & manual dexterity to interface with computer. Must have auditory acuity to handle phone calls & interaction with others.

APPROVAL SIGNATURES

This position description is intended to provide an overview of the job responsibilities & requirements & is not all-inclusive. Other responsibilities, functions, duties, working conditions, physical requirements, qualifications & experience may be required.

My signature below acknowledges I have read, understand & accept the responsibilities of the position.

Employee Signature

Date

Principal

Date