

Position Title: Producer-Property and Casualty / Health and Life, Truex Insurance

Status: Full Time, Exempt

Reports to: Company Owners

About Truex: Located in Stockton, CA, Truex is a dynamic, independently owned insurance broker specializing in Personal, Business / Commercial, and Life / Health. Our business model is built on developing genuine, life-long relationships with our clients, and on providing excellent customer care at all times. Truex employees are the best at helping people prepare for the worst.

Summary: The Producer attracts, maintains, and services individuals and businesses by offering a wide variety of products, expertise and services including, but not limited to, personal, commercial, health and life insurance.

Key Responsibilities:

The successful Producer will:

- 1) Cultivate new relationships with individuals in the community, and promote the agency.
- 2) Meet and confer with prospective clients to gather information, analyze needs, form solutions, and present proposals.
- 3) Connect with existing clients in advance of annual renewal to explain coverage, assess needs, form solutions, and present proposals.
- 4) Have the ability to explain coverage features, advantages, and disadvantages in a clear and engaging manner, in order to promote sale of insurance products.
- 5) Identify and assess various carrier products in order to select the best type of coverage, at a competitive price, for the client.
- 6) Develop amicable, productive relationships with underwriters.
- 7) Work productively with Account Managers to service client accounts in a timely, efficient, and effective manner.
- 8) Help to develop a sound relationship between clients and their Account Manager in order to facilitate day-to-day service activities.
- 9) Stay informed of all claims, and other client issues, becoming involved in their resolution when appropriate.
- 10) Provide excellent customer service at all times to ensure high client retention.
- 11) Take advantage of account rounding opportunities.
- 12) Set and achieve annual sales objectives.
- 13) Attend weekly sales meetings.
- 14) Keep abreast of emerging industry information, new products, coverage and technology.
- 15) Follow agency E & O guidelines.
- 16) Perform other administrative tasks appropriate to their role.

## Knowledge, Skills and Abilities:

### The successful Producer:

- 1) Will work cooperatively and collaboratively with Staff at all levels, and is dedicated to a respectful and collegial work environment.
- 2) Must be a self starter, and a life-long learner. Ability to define problems, collect data, establish facts, and draw conclusions. Ability to interpret an extensive variety of data. Constructive thinking and alternative short-to-long term solutions must be considered.
- 3) Will have a proven record of pursuing and closing sales.
- 4) Will have a thorough understanding of personal and business / commercial property and casualty, and/or life / health coverage.
- 5) Excellent interpersonal, verbal and written communication skills.
- 6) High attention to detail and an ability to work successfully on several projects concurrently.
- 7) Excellent time and task management, and organizational skills.
- 8) Facility with a PC environment, and competence with Microsoft Office Suite. Ability to master Agency Management Software (AMS 360).
- 9) Ability to sit and work at a computer for extended periods of time, type, move about an office environment, and to lift up to 20 pounds occasionally, with reasonable accommodation as needed.

### Other Requirements:

- 1) High School diploma.
- 2) College education or equivalent insurance experience preferred.
- 3) Must hold a current California Resident Insurance Producer for Property and Casualty license, or obtain one in the first 90 days of employment.
- 4) Bilingual (English and Spanish) a plus.

### Working Conditions:

- 1) Fast-paced, multi-tasking, sales environment requiring ongoing learning and complex problem solving.
- 2) Extensive client contact requiring frequent car travel in and around the Central Valley.

### General:

- 1) This job description is intended to describe the level of work required of the person performing the job.
- 2) Essential functions are outlined; other duties may be assigned as needs arise or as required to support the agency's essential functions.
- 3) This description is not intended as a contract and is subject to unilateral change and revision by management.
- 4) Any written contractual agreements will supersede this job description.
- 5) All requirements may be modified to reasonably accommodate physically or mentally challenged employees.