Innovative Solutions.
Traditional Values.

POSITION DESCRIPTION

Position Title: Personal Lines Insurance Consultant

Department: Personal Insurance

Reports To: Personal Lines Supervisor

FLSA Status: Exempt

Effective: 8/1/2026

POSITION SUMMARY

The Insurance Consultant independently manages an existing book of business providing exceptional service to our clients, while also actively generating new opportunities.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Establish, expand, and reinforce client relationships
- Provide excellent service to existing group of clients throughout the policy cycle
- Maintain accurate and timely documentation of client information and interactions
- Collect and analyze risk information to determine individual coverage needs
- Develop and deliver customized insurance solutions directly to the client
- Provide clients with detailed explanations of products, services, and coverages
- Independently develop and maintain strong knowledge of the marketplace
- Establish and cultivate strong internal and external working relationships
- Generate leads through referrals, networking, and community involvement
- Collaborate with internal departments to ensure client success

KEY COMPETENCIES

- Provide exceptional client service
- Strong attention to detail
- Resourceful, innovative approach to problem solving
- Strong communication skills both written and verbal
- Must be a team-player but can work independently to meet deadlines
- Ability to take direction yet show initiative to be proactive
- Interpersonal skills to build outstanding relationships and foster team environment

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POSITION REQUIREMENTS

- Experience in Personal Lines insurance servicing
- Experience with private client/complex Personal Lines insurance needs strongly preferred
- Holds current Property & Casualty insurance license
- Proficiency in agency management system; Epic experience preferred
- Insurance designation strongly encouraged
- Proficient with Microsoft Office Suite, including Excel

PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT

- Extended periods of time in a sedentary position with ability to move about office to access office equipment and attend meetings
- Prolonged periods of working on a computer using keyboard
- Work environment includes interacting with others, participating in meetings, corresponding through email and phone calls
- Must be able to communicate effectively in English both verbally and in writing to internal and external clients
- Standard office hours are Monday through Friday, 8:00am to 5:00pm; working a 7.50-hour schedule
- Occasional out-of-office travel for client visits, educational opportunities, and company-wide meetings

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