Downloaded from <https://www.velvetjobs.com/job-descriptions/insurance-assistant>

# Example of Insurance Assistant Job Description

Our growing company is searching for experienced candidates for the position of insurance assistant. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for insurance assistant

* Conduct audits of branch and individual licenses for compliance
* Answer basic licensing and insurance placement questions
* Assist in the development and delivery of webinars and conference calls
* Assists with short time frame deadlines associated with acquisitions
* Agency Onboarding
* Quote and print finance agreements and process them according to office procedures
* Take insured clients’ requests for certificates, print certificates and mail or fax as needed
* Assist in keeping client and policy information in Vision up to date according to office procedures
* Assist in billing transactions
* Attend office meetings as necessary

## Qualifications for insurance assistant

* Dependability, attention to detail, and the ability to follow/interpret procedures are a must
* Effective organizational, time management, adaptability, flexibility, multi-tasking, and communication skills are necessary
* No phone work whatsoever
* Open and scan incoming mail
* Prepare insurance forms/documents (identification cards, certificates, endorsements, schedules)
* Use intermediate skills and business knowledge to prepare insurance forms/documents (identification cards, certificates, endorsements, schedules, ), correspondence and process other insurance transactions to provide customer service and support efforts to acquire and retain profitable business