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

# Example of Insurance Assistant Job Description

Our innovative and growing company is hiring for an 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

* Proof standard communications and insurance review reports
* Optimum screening of incoming communications and routing and follow-up
* Communications with both internal and external contacts
* Collection of policy and appraisal information and the preparation of summaries of insurance
* Documentation of the insurance review activities in Sales Force
* Preparing spreadsheets and power point presentations
* Organization and maintenance of department physical and computer files
* Timely and thorough preparations of expense reports
* Perform research and analysis on competitor’s products, including product features and pricing comparisons
* Assist with developing and maintaining competitive information for the wholesaling team

## Qualifications for insurance assistant

* Must have mathematical skills and the ability to interpret and execute underwriting instructions accurately
* Copy and scan legal documents
* Lifting approximately 25 – 35 lbs
* Strong knowledge of Microsoft Excel and PowerPoint and Data Management procedures
* An analytical mind with a solution driven approach
* Willing to stretch long hours to support business needs