



## Agency Support Job Description

<b>Job Title:</b>	Property-Casualty Agency Support Assistant		
<b>Location:</b>	Remote / WFH / Physical office is in San Marcos, CA		
<b>Level/Salary Range:</b>	Based on experience	<b>Position Type:</b>	PT / FT
<b>HR Contact:</b>	<a href="mailto:jobs@schaubinsurance.com">jobs@schaubinsurance.com</a>	<b>Date Posted:</b>	4/12/2025
<b>Job Description</b>			
<b>ROLE AND RESPONSIBILITIES</b> Responsible for providing customer service and supporting agency by servicing existing accounts. This position will have the following duties and responsibilities: <ul style="list-style-type: none"><li>• Intake and process Personal Lines service requests</li><li>• Intake and process Commercial Lines service requests including certificates of insurance</li><li>• Prepare and set up renewal emails for both Personal Lines and Commercial Lines</li><li>• Reviews quotes and endorsements for accuracy</li><li>• Completes tasks and follow-ups efficiently and accurately</li><li>• Identifies and develops cross-sell opportunities</li><li>• Complies with agency management system data standards and data integrity (enters and maintains complete and accurate information)</li><li>• General clerical duties, and administrative tasks, and/or other duties as-needed</li></ul>			
<b>EDUCATION / EXPERIENCE</b> 1-3 years related work experience Valid <u>property-casualty</u> insurance license Knowledge of QQ Catalyst, a plus			
<b>SKILLS</b> Enthusiastic about the role insurance and financial products play in helping people manage the risks of everyday life, recover from the unexpected, and realize their dreams Self-motivated, detail oriented, and efficient Excellent written communication skills and customer service skills Excellent organization, attention to detail, and effective time management skills Good problem solving and strong analytical skills Must be able to work in a fast paced environment and be able to multi-task Must be able to work independently and be resourceful Must be able to work within a team, and have an effective relationship with clients, carriers and other business contacts Proficient in Microsoft Office Products			
<b>ADDITIONAL NOTES</b> Growth potential available Email us your resume, preferred salary requirements and hours, and CA department of insurance license number: <a href="mailto:jobs@schaubinsurance.com">jobs@schaubinsurance.com</a>			