CREATIVE PLANNING

Title: Personal Lines Administrative Assistant (Property & Casualty)

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The Administrative Assistant performs a wide range of support activities to facilitate the efficient operation of the Property & Casualty department. The Assistant works with Account Managers and Personal Risk Managers to onboard clients to the Property & Casualty division of Creative Planning.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Answers phones and directs calls
- Build new business files for Personal Risk Managers by doing research and completing new business worksheets
- Maintains documentation in Salesforce for newly onboarded P&C clients
- Assists with renewal policies to Wealth Managers and Financial Planners as required by agency's procedures
- Submits applications to carrier, complete quotes in PL Rater and follows up to ensure timely receipt of quotations
- Reviews quotes to verify coverages are as requested and resolves any discrepancies directly with the underwriter
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Proficiency in MS Office
- High-level multi-tasker
- Efficient, extremely detail oriented and accurate
- Excellent communication skills