



Title: Receptionist/Administrative Assistant (Property & Casualty)

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The Receptionist/Administrative Assistant performs standard office duties and a wide range of support activities to facilitate the efficient operation of the Property and Casualty department. The Assistant works with Account Managers and Personal Risk Managers to onboard clients to the Property and 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
- Mail handling – Open, sort, stamp, and distribute all in/out mail and FedEx and UPS
- Fax handling – Monitor and distribute all incoming fax
- Kitchen/Breakroom responsibilities
- Monitor and Order supplies for the office as required
- Prepare new policies for mailing and typing Form letters and Mail to clients
- Building/Equipment – Report and handle issues
- Build new business files for Personal Lines Risk Managers by doing research and completing new business worksheets
- Pull referral documents and send intro emails and follow-ups for the Risk Managers
- Maintain documentation in Salesforce/AMS for newly onboarded P&C clients
- Assists with renewal policies to Wealth Managers and Financial Planners as required by agency procedures
- Submit applications to carriers, complete quotes in PL Rater for Risk Managers and Account Managers, and follow up to ensure timely receipt of quotations
- Review quotes to verify coverages are as requested and resolve any discrepancies directly with the underwriter
- Billing/Claims monitoring and updating files as required by agency procedures
- All other duties as assigned

REQUIRED EXPERIENCE/QUALIFICATIONS:

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