



HEARTLAND
INSURANCE AGENCY, INC

Customer Service Assistant

Heartland Insurance Agency, Inc. is looking to hire a Part Time Insurance Customer Service Assistant at either our Gowrie or Jefferson IA locations. This person will work directly with the Customer Service Representative, Agents and clients, assisting with changes, quotes and documentation.

Essential Duties and Responsibilities

Responsible for timely and professional communication with clients and carriers concerning insurance policy status and transactions in addition to reviewing daily download transaction reports for accuracy

Works directly with agents, clients and underwriters in processing and keying policy endorsements, data entry, and claims.

Gather application and underwriting data and prepare insurance proposals for potential new clients as well as renewals

Processing changes, document activity, including scanning and attaching documents into Agency Management System – AMS360

Responsible for daily posting of receipts and direct bill entry statements within Agency Management System as well as monthly reconciling commission statements

Execute all other duties as assigned

Job Knowledge, Skills, and Abilities

- Excellent interpersonal and communication skills
- Ability to understand and interpret Insurance policy Declarations, Policy Forms, and Endorsements.
- Detail oriented, self-starter, strong organizational skills and multi-tasker
- Exceptional problem solving, analytical, and technical skills

Education & Experience

- Currently licensed or willing to obtain Property and Casualty &/or MPC/I/Crop Insurance License within 60 days of hire
- Two (2) plus years of experience in Accounting and Customer Service
- Experience with Property Casualty &/or MPC/I Insurance a plus
- Working knowledge of Microsoft Office (Excel and Word required)
- Ability to utilize various software programs to maintain accurate records and generate reports