



The Private Client Services Account Executive is a true professional with a solid understanding of insurance sales, service and regular and high value line's products. You are inquisitive, dynamic, passionate and not afraid to challenge status quo. You are a natural relationship builder and are client focused. Client needs come first, providing solutions and opportunities to ensure their overall satisfaction. Your closing skills and business development skills are equally strong. You are the go-to expert on all things general insurance with a keen interest in High Value clients and risks. You use all avenues available to you to market yourself including social media and community based organizations and events. You have excellent communication skills and work well in a team environment.

Why choose Waypoint?

Waypoint was locally founded in BC and now operates across 23 locations as one of the largest brokerages in BC. We have a large local presence, but we are also agile and dynamic in how we do business across the country. In 2019, Waypoint joined the Navacord group of brokerages. Navacord is a leading insurance and risk management brokerage firm dedicated to providing expert solutions to customers across Canada. With more than 2,500 employees, Navacord is Canada's 4th largest commercial insurance brokerage. Our organization can provide endless career growth opportunities all across Canada!

We offer

- Excellent benefits
- Favorable vacation policy
- Strong learning culture
- Focus on personal development
- See our website for more details about our unique combination of compensation, commitment to our employees, and culture differentiators

Key Responsibilities Include

- Work with your team and commercial account executives to execute on Waypoint's service & sales strategies
- Accountable for achieving targets in areas of new business, retention, execution and profitability
- Coordinate sales efforts with your team
- Maintain existing book of house accounts
- Enter opportunities in EPIC and report weekly on efforts
- Have a strong pipeline – qualify leads and follow up to build your book of business
- Prepare annual Sales Strategy Plan
- Maintain professional and technical knowledge of the industry and it's peripheral business
- Correspond with, and develop, strong relationships with high value insurance underwriters
- Attend industry and broker functions as necessary

- Provide and support technical assistant with the required information to complete their work
- Assist with formatting of client documents including letters, proposals, and emails
- Save your correspondence in EPIC
- Communication skills imperative – Commercial Account Executive to be included on all client correspondence to create team mentality and achieve best possible outcomes with the client
- Market support
- Assist with preparation of client proposals
- Computer savvy and able to work in a paperless environment
- Ability to prioritize tasks and handle multiple files simultaneously
- Meet deadlines on a consistent basis
- Manage AR, activities and client response in line with Waypoint policies
- Other duties as required

About You

- Building relationships and maintaining relationships comes natural to you
- Your inquisitive nature helps you to understand your clients insurance needs
- You enjoy being part of a team but you are highly motivated to work independently
- You have strong verbal and written communication skills