



**O'CONNOR**  
INSURANCE ASSOCIATES

## **PERSONAL LINES Account Manager Trainee**

**About The Agency:** O'Connor Insurance Associates is growing and we have an exciting opportunity for you to impact the growth of our personal department. Our family owned independent insurance agency has been in business for over 20 years. Our organization is fast paced, technology savvy, and very customer centric. We are boutique like in seeking clients who value a working relationship with insurance professionals. Educating our clients to enable him/her to make the right insurance decisions is part of our core mission. In every interaction with clients we seek to treat that client like a family member.

### **Do you want:**

- A pleasant workplace with friendly co-workers?
- Fast-paced, varied work with no time to get bored?
- Opportunity to grow and advance with a growing organization?

### **If yes, we hire only the best. Are you...**

- A bright, fast learner?
- Proficient on computers in the Windows environment?
- Positive, upbeat and courteous?
- Reliable, trust-worthy and dependable?
- Willing to be involved and help out wherever help is needed?
- Able to thrive and stay focused in a very fast paced environment with regular interruptions?
- Looking for an opportunity to grow both educationally and in a new career in insurance?



1973 J.N. Pease Place, Suite 203  
Charlotte, NC 28262  
Phone: 704-510-8884

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If so, our **Personal Lines Account Manager Trainee** position may be exactly what you are looking for.

### **The Personal Lines Account Manager Trainee work involves ...**

- Receptionist duties – answering the phone and greeting visitors
- Speaking with clients and assisting them with items like billing questions, claims, and changes to clients auto and home policies
- Following agency processes and procedures
- Taking accurate notes in agency management system client files
- All manner of clerical & administrative tasks
- Client contact
- Support for our marketing activities
- And much more

The **Personal Lines Account Manager Trainee** position also serves as the training ground to learn the insurance business and advance to higher levels of income and responsibility. O'Connor Insurance will pay for you to obtain your North Carolina Property & Casualty license, provide invaluable on the job training with the opportunity for you to advance your career within our organization.



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**If this interests you, no direct experience is needed. However, here is what YOU need to qualify for the position:**

- We are a professional office, so you **MUST** appear and behave professionally at all times – especially with our clients. Our dress code is business-relaxed, but we are always professional.
- The lifeblood of our business is people, so you **MUST** be able to communicate well both verbally and in writing. That means proper grammar (again verbally and in writing), a pleasant disposition, etc.
- Our office is highly automated, so you **MUST** be able to learn and retain new computer activities **EXTREMELY** fast and well.
- Your primary duties are answering the phone and greeting visitors, so you **MUST** be pleasant at all times with our callers and visitors.
- Our environment is busy and can be quite hectic at times, so you **MUST** be able to perform your tasks properly while being regularly interrupted to answer the phone and greet visitors. If you are easily flustered by chaos and “multi-tasking”, please do not apply.
- Your duties include highly detailed tasks that require great accuracy, so you **MUST** thrive on working with details and getting them right.
- You **MUST** get to work on time. You know yourself. If you can't get to work on time, please do not apply.
- You **MUST** get to work reliably. We are located in Charlotte, NC 28262.
- You **MUST** be able to work during our office hours of Monday thru Friday, 8:30am to 5:00 pm. (includes a 30 minute lunch break). These hours are not flexible. Our clients expect us to be available when we say we are.
- Have a Bachelor’s Degree or comparable work experience.
- Valid driver’s license.
- Thrive in a team environment and be a positive team player.



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### **Preferred Qualifications & Experience:**

- Receptionist, administrative and/or insurance agency experience is a plus.
- 3 Years of Insurance experience
- NC Property & Casualty License, or ability to obtain within 60 days of employment

### **Advantages of the O'Connor Insurance Team**

- Competitive Pay
- Medical insurance
- Company matched SIMPLE retirement plan (up to 3%)
- Generous time off program including; accrued PTO and paid holidays
- Casual professional dress every day
- Team focused friendly upbeat and positive team members

O'Connor Insurance is not your typical "mom & pop" insurance agency. Our professional boutique like insurance agency is built with passionate people who strive for excellence while demonstrating leadership in everything we do. We work hard, we have fun, and we make a difference in the lives of our clients every day.



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