



UNDERWRITING ASSISTANT – 20 MONTH CONTRACT

Issue Date:	May 9, 2022
Revised Date:	Feb 2, 2026
Approved by:	PAM MARSON, PRESIDENT & CEO

<u>JOB LEVEL</u>	LEVEL 2
<u>TYPE</u>	TEMPORARY – FULL-TIME
<u>REPORTS TO</u>	TEAM LEAD, PERSONAL LINES UNDERWRITING

POSITION DESCRIPTION

The Underwriting Assistant plays a vital role in ensuring the smooth operation of underwriting processes by combining administrative accuracy with technical proficiency. This position supports the timely and accurate delivery of underwriting decisions, contributing to a service-oriented team. Acting as a key liaison between underwriters, brokers/agents, and internal systems, the Assistant helps drive operational efficiency, maintain documentation standards, and enhance the overall broker/agent experience.

KEY RESPONSIBILITIES:

Technical Processing & Data Management:

- Perform pre-underwriting triage by reviewing submissions for completeness and routing them appropriately.
- Process endorsements within your authority, issue renewals and new business as per underwriter's instructions.
- Responsible for accurate and timely entry of new business into the computer system for the underwriting department.
- Prepare and submit statistical reports (OMIA Stats Submission) for all lines of business in accordance with regulatory and internal deadlines.
- Execute the Daily Premium Transfer process for all lines of business, ensuring accuracy and timely processing.
- Maintain the Underwriting SLA Log by recording and updating intake activity for all lines of business to ensure accurate daily data capture.
- Perform the Batch Driver Performance Record (DPR) process in accordance with underwriting guidelines.
- Complete the Batch Renewal process for all lines of business, ensuring timely issuance and compliance with underwriting guidelines.
- Accurately enter policy information into the company's database and maintain electronic records.
- Assist in the preparation of underwriting reports and analysis to support decision-making.
- Partner with underwriters to ensure all underwriting files and documents are saved in accordance with the company's policies & procedures.

Stakeholder Communication & Coordination:

- Answer straightforward inquiries from brokers/agents promptly and courteously and escalate when necessary.
- Liaise with external and internal stakeholders to manage inquiries and provide necessary documents as requested.

Operational Support & Compliance:

- Assist underwriters in the review and analysis of insurance applications ensuring accuracy and completeness. Assist in evaluating and assessing risks by gathering and verifying necessary information such as additional questionnaires and loss history reports.
- Process bordereaux sent by MGAs and provide first line quality control to ensure risk eligibility.



- Provide administrative support to the Manager and underwriting team leads as required.
- Review, prioritize and direct all incoming emails to the relevant task queues.
- Contribute to the achievement of established service level agreements and operational service level agreements.
- Provide backup support to other Underwriting Assistants when needed.
- Maintain a high level of integrity and ethical standards in all underwriting practices.

Other:

- Respond to any business-critical issues that may arise outside of regular business hours.
- Other duties as assigned by Leadership team.

QUALIFICATIONS, EXPERIENCE and KEY SKILLS

- Minimum high school diploma
- 2 plus years of related experience in administrative and or support function
- Insurance experience would be an asset
- Able to work within a fast-paced environment, and work well under pressure
- Mindful of making deadlines, results-oriented
- Excellent technical aptitude with web based and in-house systems and databases
- Good working knowledge of Microsoft office suite with strong MS Excel skills
- Strong attention to detail, accuracy is a critical component for success in this role
- Strong ability to exercise good judgment in a variety of situations, with strong written and verbal communication, administrative, and organizational skills, and the ability to maintain a realistic balance among multiple priorities.
- Self-motivated with an ability to work independently, efficiently & productively
- Vested interest in learning and building career in the general insurance space.
- Effective in a culture of teamwork, collaboration, and accountability; a person who encourages cooperation across the organization.