

## POSITION DESCRIPTION

Property Underwriter	
<b>BRANCH</b> NZUA	<b>DATE</b> October 2018
<b>REPORTS TO</b> General Manager – Underwriting Agencies	<b>EMPLOYMENT TERM</b> Permanent /Full time

### PURPOSE

- Underwriting all new and existing classes of business within set underwriting guidelines, authority levels and service standards

### KEY RELATIONSHIPS

INTERNAL	EXTERNAL
<ul style="list-style-type: none"> <li>Underwriting Agency Team</li> <li>EGM – Broking Services &amp; Business Operations</li> </ul>	<ul style="list-style-type: none"> <li>Insurer Partner</li> <li>Steadfast Broker Network</li> <li>Rothbury Branches and Broking Teams</li> </ul>

### KEY ACCOUNTABILITIES

RESPONSIBILITY	KEY DUTIES AND EXPECTED OUTCOMES
<b>General</b>	<ul style="list-style-type: none"> <li>Underwriting new and existing business</li> <li>Ensuring quality of underwriting activities is within limitations of company policy and in accordance with underwriting standards set by the Insurer Partner</li> <li>Protecting company risk exposure by applying retention limits</li> <li>Preparing reports on portfolio performance and maintaining credit control of business within the portfolio</li> <li>Identifying need for review of proposal assessments</li> <li>Monitoring and reviewing underwriting standards procedures and checklists</li> <li>Identifying underwriting requirements to meet business needs</li> <li>Reviewing and analysing research results</li> <li>Ensuring all documentation is accurate and complete and conforms with company guidelines</li> </ul>

### KEY PERFORMANCE INDICATORS

- Underwriting is profitable, ethical and commercially sound
- Prompt and courteous answering of all incoming calls
- Excellent client service, evidenced by client feedback
- Ability to plan workload to manage delivery on time
- Approach work with an enthusiastic and flexible disposition
- Resolution of queries achieved or referred for assistance (no unresolved policy issues)
- Correct prioritization of workload and timing of follow up for clients and insurers

## **AUTHORITIES**

### **FINANCIAL LIMIT**

- As determined by the binding agreement between NZUA and our partner insurer

## **PERSON SPECIFICATION**

### **FORMAL QUALIFICATIONS AND KNOWLEDGE**

- 2 to 3 years of underwriting experience
- Relevant insurance qualification

### **SKILLS AND ATTRIBUTES**

- High level of accuracy and attention to detail
- The right attitude
- Strong initiative and self-starter attitude
- Excellent inter-personal skills (written & verbal)
- Excellent communication skills with an outgoing personality
- Able to work with autonomy
- Numerate
- Understanding of the insurance market, policies and legislation
- Proven ability to build rapport and assist in retention of key clients
- Proven team player
- Strong time management skills
- Computer literacy (Microsoft Word, Excel)

## **SUGGESTED TRAINING COURSES**

### **GENERAL INSURANCE**

- Financial Advisers Act & Code of Conduct

### **TECHNICAL**

- NZQA Level 5 or equivalent Insurance Qualification
- Material Damage , Business Interruption, and Liability Insurance products
- Report Writing skills

### **PROFESSIONAL DEVELOPMENT**

- Problem Solving & Critical Thinking
- Time Management

### **OTHER**

- Excel - Essential Skills & Timesaving Features
- Word - Essential Skills & Timesaving Features

To register your interest in this role please submit both your CV and covering letter to [recruitment@rothbury.co.nz](mailto:recruitment@rothbury.co.nz)