

## Personal Lines Sales Executive MountainOne Insurance Agency

### About Us:

MountainOne is a mutual holding company headquartered in North Adams, Massachusetts. Banking, Insurance, and Investment products are offered at full service offices in the Berkshires (Pittsfield, North Adams, Williamstown) and on Boston's South Shore (Quincy, Rockland, Scituate). MountainOne is dedicated to the local communities we serve, with a mission of delivering solutions of real value that help individuals, businesses, and community institutions manage their financial lives with clarity and confidence.

- **MountainOne Bank**, founded in 1848, provides a complete array of personal and business banking and electronic services.
- **MountainOne Insurance** provides personal and business insurance, bonding services and group benefits solutions.
- **MountainOne Investments** provides individual investment services and group financial benefit plans (financial professionals offering securities and advisory services through Commonwealth Financial Network<sup>®</sup>, Member FINRA/SIPC, a Registered Investment Advisor)

### Position Description:

The Personal Insurance Account Executive position is a unique opportunity to join the MountainOne Insurance team in a sales role on-site at Haddad Dealerships in Pittsfield. The Account Executive will be responsible for selling personal insurance products to customers purchasing vehicles at the dealership. This is a wonderful opportunity for an independent, detail oriented and customer focused sales professional looking to gain experience and to contribute to the success of this on-site insurance team.

### Key Accountabilities and Responsibilities:

- Acting as a liaison between Haddad Dealerships and MountainOne Insurance
- Maintaining compliance of all related company policies, confidentiality, standardized procedures and regulations.
- Quoting and placing personal auto insurance policies and cross-selling homeowners, umbrella and other personal insurance products.

- Properly documenting all prospects and clients in the Agency Management System software.
- Assigning clients to Account Managers in the appropriate MountainOne Insurance location for ongoing service and retention
- Working with Haddad Dealerships employees to increase quoting opportunities
- Attending scheduled work shifts in coordination with peak car selling times
- Logging hours into MountainOne's payroll system.
- Meeting or exceeding production goals.
- Any other duties as assigned by management

## Qualifications:

- Minimum high school diploma;
- Obtain and maintain MA Property & Causality Insurance Broker's License and any other license as required by residence state;
- Has solid understanding of insurance work methods and procedures;
- Ability to effectively communicate and present information to clients, company and agency staff;
- Ability to be self-motivated, provide problem-solving capabilities and prioritize multiple tasks;
- Commitment to the company's culture and established service standards;
- Ability to deal with and show discretion in confidential matters;
- 25% availability to travel outside of 25-mile radius and report to any office;
- Ability to sit, drive, bend, answer the phone, and perform computer input.

## To Apply:

Please email your resume and letter of interest to: [careers@mountainone.com](mailto:careers@mountainone.com). MountainOne is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, age, disability, or veteran status. (Compliant with VEVRAA and Section 503 rules)

MountainOne Bank is Member FDIC. Member DIF.  Equal Housing Lender.

**Insurance and Investments are not insured by the FDIC and are not deposits or other obligations of, or guaranteed by, any depository institution. Funds are subject to investment risks, including possible loss of principal investment.**

The financial advisors of MountainOne Investments offer securities and advisory services through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through CES Insurance Agency or MountainOne Investments. MountainOne Bank is not a registered broker-dealer or Registered Investment Adviser. MountainOne Bank and MountainOne Insurance are not affiliated with Commonwealth. MountainOne Investments' main office is located at 85 Main Street, Suite 100, North Adams, MA 01247. (413) 664-4025