



Insurance Administrator

For years, DPM has been the go-to choice for doctors seeking personalised financial services, guiding them from their medical education to retirement. Situated in Melbourne and Sydney, our mid-sized firm boasts a workforce of around 140 employees across diverse financial sectors.

Our Insurance Team is expanding, and we're looking for a skilled professional to join our Insurance Products team. This role offers an exciting opportunity for someone with excellent organisational abilities and a passion for the insurance industry to embark on a rewarding career path, or an ideal challenge for an experienced Insurance Administrator seeking new horizons.

What's in it for you?

- Flexible working: We support a balanced work style, incorporating a blend of office and work from home.
- Additional leave: Enjoy five additional paid leave days annually.
- Motivating team: Be part of a forward thinking, energetic and supportive team committed to constant learning and improvement.
- State of the art office space: Work from our brand new, modern office located conveniently on St Kilda Rd, right next to the Anzac Station and tram stop. With exceptional views and superb amenities, our office creates a relaxing work environment.
- Social culture: Experience a lively social atmosphere with an engaging calendar of events and activities.

In this role, you'll be responsible for:

- Administrative tasks for clients, including processing change of beneficiary requests, cancellations, correspondence, receipts and invoices
- Assisting with client queries, as the point of contact via the PIP Insurance phone line
- Ensuring accurate maintenance of client-related data
- Displaying empathy towards clients during challenging situations such as claims or financial hardship
- Providing efficient and effective client service support to all business partners across the PIP Insurance product range including the Claims, Tax and Investment business streams
- Undertaking various support duties to keep operations running smoothly

You will be successful because you have:

- Knowledge of the Insurance industry (*preferred*)
- Experience in a similar level administration role (*required*)
- A positive can-do attitude with a willingness to pitch in and support the team where needed
- Excellent administrative and communication skills
- A compliance mindset, coupled with exceptional attention to detail
- Strong ability to plan, organise and prioritise your work independently
- Proficiency in the Microsoft Office Suite i.e. Excel, Outlook, Word

The full position description is available on the next page.

Interested?

To take the exciting next step in your career with a progressive and supportive company – apply today! Candidates that wow us will be contacted for an interview immediately!

To be eligible, you must be an Australian Citizen/ Permanent Resident, or have full working rights.

Insurance Administrator

Division: Financial Services & Corporate Governance

Department: Insurance Products

Manager/ Team Leader: Team Leader, Insurance Products

Position description review: April 2024

Purpose

The Insurance Administrator provides efficient and effective administration and client support services across the Insurance Products department, specifically the Professional Insurance Portfolio (PIP) products.

What does success look like for this role?

- Administrative tasks relating to the role are carried out on time, accurately, efficiently and effectively
- All service level agreements are met
- All client queries are responded to and resolved appropriately
- Client service is of a high standard and at the forefront of behaviour and action
- Client related information and data is maintained accurately
- Preparation and distribution of all mail-out requirements are delivered accurately and on time

Responsibilities

Insurance Service

- Point of contact on Insurance phone line (PIP), assisting with client queries
- Processing change of beneficiaries, cancellations, correspondence, receipts and invoices for clients
- Provide Insurance payment request information to internal stakeholders as required
- Follow up missed Direct Debit Instalments with relevant stakeholders
- Set up new clients, proposed clients and updating changes as required
- Ensure data is accurately maintained for all client-related information
- Manage Insurance (PIP) email inbox, intranet and task assignments
- Meet and adhere to DPM's service standards

Administration and Operations

- Process insurance payments and upload banking
- Prepare and issue policy completion documentation and manual renewals
- Create journals and refunds in readiness for authorisation



- Action relevant responsibilities with Memorandum of Transfers & Bank Reconciliations
- Review/correct any monthly lapses in accordance with cancellation procedure
- Prepare Direct Debit contracts for PIP and ensure system is updated
- Assist with all aspects of the annual policy renewal project
- Liaise with internal/external service providers
- Provide details of premiums paid to internal stakeholders and clients, upon request
- Upload Direct Debit lodgements
- Make outbound calls to clients regarding insurance premiums and cover details
- Perform ad-hoc duties in support of broader business needs
- Provide updates and reports relating to Insurance Products, as required
- Coordinate and assist with bulk mail-outs, as needed

Client Service Support

- Provide an efficient and effective client service support to all business partners across the PIP product range including Claims, Tax and Investment business streams
- Contribute to & action administrative tasks in support of the PIP Claims team, as requested
- Display empathy & compassion for clients during difficult times e.g. claims, financial hardship, complaint handling
- Answer client queries received by phone and email
- Liaise with external service providers
- Maintain relationships with all internal and external stakeholders

Continuous Improvement

- Assist, review and support various improvement initiatives within the team
- Support fellow team members with training, peer-review and providing feedback with respect, patience and understanding
- Contribute to the development & maintenance of process guides including updating of manuals, templates and any other reference material relevant to the role

Qualifications, Skills & Experience

- Previous experience of a similar role in the life insurance industry would be an advantage
- Strong written and verbal communication skills when dealing with all stakeholders
- Ability to work with limited supervision as well as contribute to the team
- A positive can-do attitude with a willingness to pitch in, supporting the team where needed
- Excellent time-management and organisation skills
- Demonstrated ability to be innovative and flexible
- A compliance mindset, coupled with exceptional attention to detail
- Ability to identify problems and apply a strategic, solutions-focused approach
- Strong computer literacy – Intermediate knowledge of Microsoft Office suite

