



Job Title: Agency Services Coordinator
Position Reports to: Sales/Marketing Director
Classification: Exempt/Full-time
Location: Home office in Ponte Vedra Beach, FL

Position Summary: Southern Oak is looking for an Agency Services Coordinator for our sales and marketing team. This position will work closely with our agency partners and territory sales managers optimizing the agent/company relationship. As an important member of the sales/marketing team, this candidate will be responsible for promoting our agency partnership while coordinating and completing tasks associated with agency services.

Primary Responsibilities:

- Processing new appointment applications, agent licensing and credentialing
- Assisting agents with inquiries regarding licensing and appointment status
- Handling ACH information and IVANS account data
- Coordinating agency buy/sell agreements and agent of record changes
- Organizing agency files per regulatory and industry requirements
- Complying with all federal and state regulations as well as company policies and procedures
- Special projects as assigned by Management

Qualifications:

- Bachelor's degree in Business or related field of study (Marketing, Business Management) or five years of experience in the property and casualty field
- Bilingual in English and Spanish preferred
- Personal Lines P&C license preferred, but not required
- Detailed oriented with the ability to multi-task
- Strong written and verbal communication
- Exceptional organization and time management skills
- Ability to contribute to a positive and collaborative work environment
- Proficient in MSO/365 applications such as Word, Excel, PowerPoint, Teams, Outlook

Benefits:

- 401(k) with dollar-for-dollar company match up to 6%
- Medical, dental & vision
- Wellness & mental health
- Company paid Life, Short- and Long-Term Disability
- Paid time off
- Diverse, inclusive & welcoming culture
- Career development & tuition assistance
- Equal Opportunity Employer



Satisfactory completion of a post-offer drug screening and background check is a condition of employment.

Company

Southern Oak is a Florida-based insurance company specializing in personal residential property coverage with its home office in Ponte Vedra Beach, FL.