



## Underwriting Assistant

**Location:** Fredericton, New Brunswick

**Department:** Underwriting

**Reporting Line:** Senior Leader, Underwriting & Partner Relations

### Job Summary

The Underwriting Assistant Specialist plays a key role in supporting accurate, efficient and compliant underwriting operations while contributing to a positive experience for agents and customers.

From a **company perspective**, the ideal candidate understands the importance of accuracy, efficiency, and compliance. This includes a working knowledge of insurance processes, the ability to navigate systems and troubleshoot issues, and an awareness of regulatory requirements, including the proper handling of required communications such as Registered Mail to reduce risk and ensure compliance.

From a **team perspective**, the ideal candidate is proactive, dependable, and eager to learn. The successful candidate is comfortable stepping in to resolve issues, asking questions, and building knowledge through hands-on learning. Taking initiative to support training and understand how other departments interact with underwriting will help strengthen collaboration and workflow efficiency.

From a **customer and agent perspective**, this role requires an understanding of how processing decisions affect the customer experience, billing and payments. Strong communication and problem-solving skills are essential, along with the ability to manage inquiries or escalations professionally. The successful candidate takes ownership of issues, ensures timely resolution, and shares learnings with the source of errors to support continuous improvement.

Experience in auto insurance and compliance awareness are valuable insofar as they support these responsibilities and contribute to operational success and service excellence.

The Underwriting Assistant works closely with the Underwriting Assistant Specialist.

### Key Responsibilities

#### **1. Primary Focus: Underwriting Support**

- Process insurance applications and transactions, including renewals, change requests, and cancellations, ensuring all documentation is accurate, complete, and compliant
- Generate and issue policies, endorsements, cancellations and related billing documents, maintaining accurate and well-organized electronic records
- Respond to agent and customer requests by collaborating with underwriters and internal teams to resolve discrepancies and meet service standards.
- Follow data protection and confidentiality requirements to safeguard sensitive client information.

#### **2. Technical Expertise in Underwriting Support**

- **Data Entry & Verification:** Accurately enter applicant information into underwriting systems and verify documentation against internal checklists for completeness.
- **Documentation Management:** Organize, label, and upload policy-related documents into the digital filing system.
- **Initial File Review:** Perform first-pass review of new submissions, identifying missing information and flagging discrepancies for senior team members.
- **Status Tracking:** Monitor pending files and update internal trackers to support departmental turnaround times.
- **Compliance Participation:** Complete required security and privacy training and follow established data handling protocols.
- **Communication Support:** Draft standard follow-up correspondence to agents or internal departments to request missing documentation or clarify basic file details.

### 3. Quality, Accuracy & File Readiness

- **Initial Accuracy Self-Checks:** Review assigned files against standard checklists to confirm data accuracy and completeness before submission to underwriting.
- **Documentation Preparation:** Collect, organize and verify required policy documentation, ensuring all information is complete and legible.
- **Error Correction & Remediation:** Address underwriting feedback promptly by updating records, re-requesting missing information, and documenting resolution steps.
- **Data Entry Standards:** Execute high-volume data entry into the underwriting system.
- **Compliance Protocol Adherence:** Follow all established security and privacy protocols for handling sensitive applicant data to ensure every file is "audit-ready."
- **Workflow Tracking:** Update the status of pending files in real-time to provide the broader team with visibility into volume and potential processing bottlenecks.

### Qualifications & Experience

#### Required

- Demonstrated experience in underwriting support, insurance operations, or a related technical role. Strong knowledge of documentation standards, system usage, and operational workflows
  - High attention to detail with strong organizational and documentation skills

#### Preferred

- Experience in a regulated or document intensive environment
  - Familiarity with underwriting systems and policy administration platforms

#### Key Competencies

- Technical underwriting support expertise

- Quality assurance and attention to detail
- Operational judgment and workflow discernment
- Clear and professional communication
- Documentation rigor and process discipline
- Continuous improvement mindset

#### **Working Conditions**

- Office-based role with regular interaction across multiple departments and external partners in a fast-paced environment.

#### **Professional Development**

- UGIC supports all employees in furthering their education through the Canadian Insurance Institute.
- All UGIC staff have full access to the LinkedIn Learning platform, which offers a variety of courses to enhance knowledge and skills.
- Mentorship and career development support is available, leveraging employee extensive experience and professional expertise.

#### **Success Measures**

Within 12 to 24 months, success in this role will be demonstrated by:

- Consistently high-quality underwriting support files that meet technical and documentation standards
- Improved accuracy, efficiency, and confidence among underwriting assistants
- Reduced rework, errors, and delays due to support or documentation issues

**To Apply:** If you are interested in this position, please send your resume to [Jason.court@ugic.nb.ca](mailto:Jason.court@ugic.nb.ca)

We appreciate all applications, only those selected for an interview will be contacted.

Deadline for submissions is **May 3, 2026**.