



Operations Assistant * Mike Preis, Inc. Jeffersonville, NY

Overview: Mike Preis, Inc. is seeking an Operations Assistant in Jeffersonville, NY.

The Operations Assistant supports daily administrative, operational, and accounting functions for the Mike Preis Insurance Agency. This role ensures smooth internal workflows, accurate documentation, timely processing of client and financial transactions, and consistent operational compliance. The Operations Assistant works closely with agency leadership and licensed staff to maintain an organized, efficient, and client focused environment.

Responsibilities include;

Assist in the automation and distribution of information necessary for the processing of personal and commercial lines insurance coverages, changes, and cancellations including organizing and downloading policy documents, and supporting staff with system tasks.

Update carriers and process filings and carrier specific requirements.

Monitor and route incoming calls, emails, and mail; ensure timely follow up and escalation when needed.

Track and document carrier non-insurance procedures changes (i.e. website, document distribution, contact info).

Support office operations including supply management, equipment maintenance and scheduling, and basic technology troubleshooting.

Assist with advertising and the procurement of printed materials (office & promotional materials), proposal covers, office signs, etc.

Scheduling and tracking of continuing education requirements, license renewals and related licensing support. Assist with Cyber Security Compliance annual review.

Mail and shredder processing.

Process client and commission payments and post transactions accurately in the agency management system.

Process and reconcile daily deposits and assist with monthly reconciliation of agency accounts.

Assist with account payables, expense tracking, and basic bookkeeping tasks.

Maintain organized financial records in compliance with agency and regulatory requirements.

Assist with agency and financial report generation and retrieval.

Assist with month end agency reporting.

Other duties as necessary or assigned.

Skills required for job;

Strong organizational skills with the ability to manage multiple tasks and deadlines.

High attention to detail and accuracy in both documentation and financial entries.

Excellent written and verbal communication skills.

Proficiency with Microsoft Office (Outlook, Word, Excel) and comfort learning new systems.

Ability to maintain confidentiality and handle sensitive financial and client information.

Familiarity with insurance carrier portals and agency management systems (e.g., Applied Epic).

Basic understanding of accounting principles, invoicing, and reconciliation processes.

Requirements:

High School Diploma

Reference Check

Valid Driver's License

1 - 3 years of administrative, operations, accounting, or office support experience

Experience in a personal or commercial lines insurance agency or related financial services environment preferred.

Shift, Salary, and benefits: This is a full-time position, Monday-Friday, First Shift, \$23.00-25.00 hourly, Benefits include; Health Insurance, Paid Vacation, Paid Sick Leave, Holidays, and 401(k)/Retirement.

Apply by sending an email with your resume to Galessi@trubuffalohr.com.