



**PATRICK MCNEALIS**  
INSURANCE AND FINANCIAL GROUP  
HELPING TO PROTECT AND GROW YOUR ASSETS

## **CAREER PATHWAY**

**111 E Harrison St Suite 1,  
Emmaus, PA 18049  
610-433-6854**

**<https://www.patrickmcnealis.com/>**

### **Business Description**

The Team at the Patrick McNealis Insurance and Financial Group is welcoming and engaging, ready to assist in any capacity. The type of service we provide is caring and personal, understanding that every person has unique needs. The team takes the time to know what is important to each client and go above and beyond to provide the appropriate protection needed. We are ready to insure your son's first car, protect the home you love, and provide peace of mind for the unexpected events of life.

### **Knowledge, Skills, and Abilities Needed**

Ideal candidate is bright and eager to learn, takes direction well, can prioritize and juggle multiple tasks, works well both independently and as part of a team, possesses strong oral and written communication skills, and can provide excellent customer service with a smile!

### **Connect with us on Social Media!**



Patrick McNealis  
Insurance and  
Financial Group



patrick\_mcnealis\_insurance



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## PERSONAL LINES ACCOUNT CAREER PATHWAY

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Personal Lines  
Account Manager

High school diploma or equivalent required; college degree preferred  
Must currently possess a Property & Casualty license; 1-2 years of experience within a similar role preferred.

Proficient with Microsoft Office (Excel, Word, Outlook) • Detail-oriented, able to multi-task, and works well under pressure • Good problem-solving skills • Excellent oral and written communication skills • Highly organized with good time-management skills essential to meeting deadlines • Able to reprioritize effectively when necessary



Customer Care  
Specialist

- High school diploma or equivalent required; college degree preferred
- Proficient with Microsoft Office (Excel, Word, Outlook) • Detail-oriented, able to multi-task, and works well under pressure • Good problem-solving skills • Excellent oral and written communication skills • Able to reprioritize effectively when necessary



Appointment  
Setter

High school diploma or equivalent required; college degree preferred. Open for internships to high school students as well therefore diploma would not be required.

Proficient with Microsoft Office (Excel, Word, Outlook) • Detail-oriented, able to multi-task, and works well under pressure • Good problem-solving skills • Excellent oral and written communication skills • Able to reprioritize effectively when necessary.

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