

Personal Lines Account Manager

Job Description:

The primary function of this position is to provide quality service to clients and cross sell within the agency. The Account Manager will be the day-to-day liaison between the insurance company and their clients. Daily servicing of clients will include addressing various coverage issues, and handling all the inside service work associated with the clients account, including all endorsement activity, routine coverage questions, problem solving, renewals, checking and binding policies. This is an exempt position and reports to the office manager.

Job Duties:

- Build and maintain relationships with clients.
- Provide consistent, accurate, and timely communication to clients through, verbal and written correspondence.
- Conduct face to face meetings with the clients as necessary.
- Inform and educate clients about coverage, exclusions and exposures; document electronic files accordingly.
- Respond to clients' needs by producing binders, certificates, policies and other related items.
- Maintain client files in Epic and use Epic for processing all transactions.
- Process daily incoming mail.
- Know the underwriting and rating procedure for all types of personal lines policies.
- Quote and sell personal line policies.
- Provide technical support to Producers (coverage-wise, with proposal, suspense, items etc.) to help clients.
- Prepare applications, submit them to insured's and carriers, obtain clients' signatures on all applications, and follow up to ensure timely responses.
- Renew policies by agency standards.
- Maintain client files accurately and consistently documenting conversations, sending confirmations to clients, adhering to all other automation procedures.
- Handle cancellations with care, saving all accounts possible with adherence to E&O guidelines.
- Other duties as assigned relevant to the position.

Position Requirements & Job Conditions:

- Minimum 5 years experience in Personal Lines, hold a P&C license in Oregon.
- Understanding of personal insurance underwriting, coverage & rate analysis.
- High School Diploma, GED, or equivalency of experience.
- Knowledge of insurance coverage's and an ability to communicate this clearly to clients and underwriters.
- Strong written and verbal communication skills.
- Ability to organize, prioritize and self-manage work load.
- Computer literate with experience using Word and Excel.
- Ability to work in a paperless environment
- Ability to work in a team environment, with a positive attitude, and willingness to help.
- Able to work under pressure and time constraints.
- Ability to sit for long periods of time, with significant keyboarding required.
- Can work independently with little supervision.
- Lifting up to 20 pounds
- Good attendance.