POSITION TITLE: ACCOUNT MANAGER, PROPERTY & CASUALTY

REPORTS TO: SENIOR ACCOUNT MANAGER, PROPERTY & CASUALTY

CONNER INSURANCE

JOB SUMMARY AND PURPOSE

The Account Manager, Property & Casualty provides daily support to the P&C Advisors and clients. Those duties include: Processing applications for, changes to, reinstatement of, and cancellation of insurance policies, reviewing insurance applications to ensure that all questions have been answered, compiling data on insurance policy changes, changing policy records to conform to insured party's specifications, compiling data on lapsed insurance policies to determine automatic reinstatement according to company policies, canceling insurance policies as requested by agents, and verifying the accuracy of insurance company records.

ESSENTIAL DUTIES:

- Provide technical support to agent; specifically in analyzing client needs, coverage forms and quotations
- Accompany Advisor on prospect and client meetings as requested
- Assist in the customization insurance programs to suit individual customers, often covering a variety of risks
- Complete applications in coordination with agent; submits applications to eligible and appropriate carriers; follows up to ensure timely receipt of quotations and policies
- Contact underwriter and submit forms to obtain binder coverage
- Confer with clients to obtain and provide information when claims are made on a policy
- Monitor insurance claims to ensure they are settled equitably for both the client and the insurer
- Process renewals in coordination with agent. Occasionally take lead in renewal meeting with client, strategy determination, marketing and carrier negotiations
- Uses agency credit and collection policy in invoicing and pursuing prompt payments; request cancellations from the carrier according to agency standards
- Correspond with insured or agent to obtain information or inform them account status or changes
- Prepares premium allocations for clients as needed

ADDITIONAL DUTIES:

- Attend meetings, seminars and programs to learn about new products and services, learn new skills, and receive technical assistance in developing new accounts
- Calculate premiums and establish payment method.
- Perform other duties as assigned

EDUCATION and/or EXPERIENCE:

- Prefer Bachelor’s degree or at least an Associate’s degree or equivalent from two-year College or technical school.
- High School diploma or equivalent is required.
- Prefer a minimum of two years related industry experience and/or training.

SKILLS:

- Proficient in all Microsoft Office Products
- Applied Systems (Insurance Software)
- Analyzing Data or Information
- Making Decisions and Solving Problems
- Communicating with Persons Outside Organization
- Communicating with Supervisors, Peers, or Subordinates
- Establishing and Maintaining Interpersonal Relationships
- Organizing, Planning, and Prioritizing Work
- Documenting/Recording Information
- Evaluating Information to Determine Compliance with Standards
- Monitor Processes, Materials, or Surroundings
- Evaluating Information to Determine Compliance with Standards
- Use telephone communication techniques
- Examine financial documents to verify issue
- Type letters or correspondence
- Detect discrepancies on records or reports
- Fill out business or government forms
- Interview customers
- Active Learning & Listening
- Critical Thinking
- Learning Strategies
- Mathematics

CERTIFICATES, LICENSES, REGISTRATIONS

- Maintain a current Indiana Property & Casualty insurance license

STARTING COMPENSATION:

Differs with experience.

Disclaimer: Although the Company has attempted to accurately and thoroughly describe this position, the Company reserves the right to change the same, including to change, add to or subtract from the duties outlined, within the sole discretion of the Company, at any time, with or without advance notice.