



CONNER
INSURANCE

POSITION TITLE: ACCOUNT MANAGER, PERSONAL LINES
STATUS: EXEMPT
REPORTS TO: PERSONAL LINES MANAGER

JOB SUMMARY AND PURPOSE

The Account Manager, Personal Lines position is crucial to the day-to-day operations and long-term goals of the Personal Lines Department. The Account Manager provides daily support to the PL Advisors and clients.

This includes: 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; cancelling insurance policies as requested by Advisors; and verifying the accuracy of insurance company records.

From servicing accounts, to processing claims, to retaining Personal insurance accounts, the Account Manager's responsibilities are equally varied and vital. A strong work ethic, ability to take on multiple responsibilities, and knowledge of agency procedures and standards are a must!

ESSENTIAL DUTIES:

- Provide technical support to Personal Lines Manager; specifically in analyzing client needs, coverage forms and quotations.
- Act as liaison between client and insurance companies in order to independently resolve service problems.
- Assist in the customization of insurance programs to suit individual customers, often covering variety of risks.
- Complete applications in coordination with Advisor; submits applications to eligible and appropriate carriers; follows up to ensure timely receipt of quotations and policies.
- Contact underwrite 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 the both the client and the insurer.
- Correspond with insured to obtain information or inform them of account status or changes.
- Use agency credit and collection policy in invoicing and pursuing prompt payments; request cancellations from the carrier according to agency standards.
- Ordering and processing renewals and change requests with an emphasis on Personal Insurance Risk Management.
- Process additional lines of coverage for accounts, when necessary.

ADDITIONAL DUTIES:

- Attend meetings, seminars and programs to learn about new products and services, learn new skills and receive technical assistance in developing new customers.
- Perform other duties as assigned.

EDUCATION, CERTIFICATES, LICENSES, REGISTRATIONS AND/OR EXPERIENCE:

- Prefer bachelor's degree, or an associate's degree or equivalent, from two-year college or technical school
- High school diploma or equivalent is required
- Prefer a minimum of five years related industry experience and/or training
- Maintain a current Indiana Property & Casualty insurance license

SKILLS:

- Proficient in Microsoft Office suite of products and Adobe Acrobat
- Good understanding of all lines of personal insurance coverage
- Understanding of contracts, carrier products, coverage forms, and underwriting guidelines
- Ability to read, analyze, and interpret industry policies and contract documents
- Ability to respond to common inquiries or complaints from customers or carriers
- Ability to write and prepare proposals for presentation and review
- Ability to effectively present information to insureds and carriers
- Ability to apply basic mathematical concepts such as percentages, addition, subtraction, multiplication and division
- Ability to think independently and critically
- Ability to define problems, collect data, establish facts, and draw valid conclusions
- Ability to handle complex accounts
- Excellent oral and written communication skills
- Ability to perform duties in a high-pressured, fast-paced environment
- High degree of organizational skills
- Initiative and attention to detail
- Ability to prioritize and remain flexible
- Professional telephone skills and etiquette
- Self-motivated and able to work both independently with limited supervision and within a team

The above statements are intended to be a representative summary of the responsibilities performed by incumbents of this job. The incumbent's may be requested to perform job-related tasks other than those stated in this description.