



ACCOUNT MANAGER/ SENIOR ACCOUNT MANAGER

JOB DESCRIPTION

Position Description

This is a service (approx. 90%) and sales (approx. 10%) position. The primary function of this position is to provide the highest quality service to customers and cross sell within the existing book of business. The Account Manager (AM) will be the day-to-day liaison between the insurance company (MIB) and designated accounts managed by Account Executives/Sr. Account Executives/Producers.

Daily servicing of customers will include addressing various coverage issues, contract analysis, exposure analysis, issuing auto ID cards, handling all the inside service work associated with the client's accounts, including all endorsement activity, routine coverage questions, problem solving, renewal control, preparation of formal proposals, checking and binding policies.

The Senior Account Manager (SAM) should have experience in all areas of personal insurance. As needed, the SAM will coordinate with and defer to the Account Executive/Sr. Account Executive/or Producer on strategic account issues and potential problems. The AM and SAM are responsible for the successful fulfillment of Standard Operating Procedures and Guidelines (SOG's).

Location: Van Nuys, California

Position Requirements

- Know the underwriting and rating procedure for all types of personal lines policies.
- Quote new business and renewal options to every client.
- Prepare proposals and applications, submit them to insured's and carriers, obtain client's signature and follow up to ensure timely responses, all in conjunction with AE or Producer.
- Prepare and provide to every client a Summary of Insurance once coverage is bound and in effect for new accounts.
- Immediately update Summary of Insurance for existing clients.
- Remarket accounts as directed and follow up with AE or Producer.
- Maintain agency EPIC files accurately and consistently documenting conversations in emails and other notes sent to clients, while adhering to all MIB electronic and EPIC procedures.
- Handle cancellations timely by checking carrier websites or NOC's received via scan, fax or email, legally saving all accounts possible with adherence to E&O guidelines.
- Prepare and check policies based on SOG's checklist to include preparing letters, invoicing, summaries of insurance, certificates, ID cards, evidence of insurance, binders, etc. Policies must be checked for accuracy and all applicable endorsements.
- Know and be up to date on the utilization of carrier websites, carrier communications, new coverage options, and billing procedures.

Preferred Skills and Abilities

- Any college course work in mathematics, communications, risk management or other analytical coursework.
- Interpersonal and problem solving abilities.
- Organizational and time management skills.
- Agency Management System (i.e., EPIC, AMS 360) or other paperless computer system.

Physical Actions

Required job duties are essentially sedentary work consisting of occasional walking, standing and lifting and/or carrying 10 lbs. maximum, bending, talking, and hearing.

Physical Environment

Required job duties are normally performed in a climate controlled office environment.

Education Requirements

- High School Diploma
- Current California Property and Casualty License, other states a plus.

Experience Requirements

- 2-4 years experience on insurance coverage options.
- Agency or Brokerage experience.
- Experience utilizing carrier websites to market and rate new and/or renewal business.
- Must have experience with MS Office Suite (Word, Excel, Outlook).

Special Skills Requirements

- Strong written and verbal communication skills.
- Strong follow up skills.
- Results oriented.
- Fosters a customer service orientation.
- Sound problem solving skills.
- Consistent exercise of good judgment; high integrity.
- Prioritize and complete multiple tasks simultaneously.
- Work effectively under pressure, meets deadlines.
- Work independently and collaboratively with a team.

Momentous Insurance Brokerage provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expressions, or any other characteristics protected by the law.