



## ASSISTANT VICE PRESIDENT

### JOB DESCRIPTION

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#### **Position Description**

This is a sales (approx. 50%) and service (approx. 50%) position. The primary function of this position is to provide the highest quality service to customers, prospect new customers/be an active participant in new business meetings, cross sell within the existing book of business, mentor and manage support staff. The Assistant Vice President (AVP) will be the main point of contact between the insurance company (MIB) and clients (Business Managers, client representatives, and the clients themselves). The AVP will provide daily guidance and oversight to the support staff responsible for processing transactions of an assigned book of business.

The AVP level must have extensive experience in their field to include constant expansion of knowledge about new products and services available to suit the needs of each client.

**The position requirements include, but are not limited to the aforementioned and the following:**

#### **Position Requirements**

- Build and maintain constructive and effective relationships with clients by meeting and exceeding client expectations at all times.
- Provide consistent, accurate, timely and pertinent communication to clients.
- Resolve/assist with any service or claims issues/questions.
- Assist in design of or independently design insurance plans for clients think about out-of-the-box solutions.
- Assist clients in making appropriate coverage changes; make each contact a marketing opportunity.
- Develops ideas independently and without prompting.
- Conduct face-to-face meetings with the clients to review summary reports, make presentations, and to maintain client relationships.
- Inform and educate clients about coverage, exclusions, and exposures; gaps in coverage, stewardship programs; and other relevant information.
- Monitor and review client satisfaction at least quarterly; address findings/issues to increase client satisfaction.
- Seek referrals from client base and follow through to get new accounts.
- Cross sell and/or refer new business leads to appropriate departments.
- Quote new business and renewal options to every client.
- Review and check policies based on SOG checklists to include proposals, applications, letters, invoicing, summaries of insurance, certificates, evidence of insurance, binders, etc.
- Full responsibility to manage AR's, activities, production, and expiration lists for book of business.
- 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.

- Train and develop employees on all aspects of processing per company SOG's.

### **Preferred Skills and Abilities**

- AVP requires insurance designation and 15 years of work experience in insurance.
- Effective interpersonal skills, problem solving abilities.
- Organizational and time management skills.
- Agency Management System (i.e., EPIC, EPIC, AMS 360) or other paperless computer system.

### **Physical Actions**

Required job duties are a mix of sedentary work consisting of occasional walking, standing and lifting and/or carrying 10 lbs. maximum, bending, talking, and hearing; and 25% of time must be able to travel by automobile, plane or train.

### **Physical Environment**

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

### **Education Requirements**

- High school diploma or GED required, college coursework preferred.
- Current California Property and Casualty Insurance Broker License.

### **Experience Requirements**

- Mastery (15 or more years) of insurance underwriting, coverage and rate analysis and client management experience.
- Knowledge of carrier websites to market and rate new and/or renewal business.
- Experience with MS Office Suite (Word, Excel, Outlook).

### **Special Skills Requirements**

- Strong written and verbal communication skills
- Strong follow-up skills and interpersonal, analytical, problem solving abilities.
- Results oriented, work under pressure, meets deadlines
- Fosters a customer service orientation
- Consistent exercise of good judgment; high integrity and work ethics.
- Prioritize and complete multiple tasks simultaneously.
- Work independently and with a team.
- Must understand marketplace trends and best practices to meet clients' needs.
- Strong negotiating skills and ability to close a sale.

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.