



Management Liability ACCOUNT MANAGER/ SENIOR ACCOUNT MANAGER

JOB DESCRIPTION

Position Description

This is a service 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.

Daily servicing of customers will include assisting with the pre-renewal process, renewal marketing, preparation of proposals, binding and confirming coverages, addressing client questions and problem solving.

Location: Van Nuys, California

Position Requirements

- Assisting with and handling pre-renewal process, including reviewing EPIC file, preparing or checking renewal solicitation, and claims review.
- Assisting with the renewal marketing process
 - Reviewing applications and supporting documentation
 - Sending to appropriate carriers or wholesalers.
 - Follow-up in a timely manner for quotes
 - Coordination with appropriate team member for coverage negotiation materials.
- Prepare renewal proposals
 - Review Quotes upon receipt and request any necessary changes or corrections
 - Coordinate with team member to determine options to present
 - Prepare proposal and follow-up as appropriate for bind order.
- Handle and/or assist with renewal confirmations:
 - Invoice premium
 - Prepare renewal summary, confirmation email and finance agreement if needed
 - Suspense for any pending subjectivities, premium payment and policy receipt
 - Data faction if appropriate
- Miscellaneous servicing
 - Policy checking and processing
 - Contract review for certificate requests
 - Issuance of insurance certificates
 - Client inquires
- 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.
- Know and be up to date on carrier communications, new coverage options and billing procedures.

Preferred Skills and Abilities

- Interpersonal, analytical, 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, hearing.

Education Requirements

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

Experience Requirements

- 2 to 4 years experience in Management Liability insurance coverage options.
- Agency or Brokerage experience.
- Mastery of insurance underwriting, coverage and rate analysis.
- Must have experience with MS Office Suite (Word, Excel, Outlook)

*Senior level requires minimum 5 years experience in all areas of Management Liability insurance and client management.

Special Skills Requirements

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