



ACCOUNT MANAGER JOB DESCRIPTION

Reporting to: Amanda Kuiper

Responsibilities of the Account Manager include but are not limited to:

- Marketing and account management for assigned book of clients.
- Coordinate all aspects of renewal marketing process with client and provide program structure review and analysis.
- Prepare account specifications, identify carriers to market to, negotiate pricing and finalize policy binding and conditions.
- Prepare coverage and pricing comparisons for expiring vs. renewal term when applicable.
- Prepare proposals.
- Provide technical competence in areas of coverage and current markets.
- Explain and clarify coverage forms to clients.
- Identify potential coverage gaps and make coverage recommendations.
- Thorough documentation is required on each account, with proper E&O procedures strictly followed.
- Round out accounts
- Marketing of service center accounts, as needed (i.e. client calls for loss runs, requests alternative quote, carrier non-renews etc.)
- Reassign accounts if moved out of service center.

Qualifications

- Current California Property and Casualty License is required
- 3-5 years of experience working in a brokerage or agency
- Basic indemnity coverage knowledge including various products for Commercial Lines Insurance.
- Strong understanding of Underwriting Guidelines for multiple carriers.
- Previous working experience with computers required; Microsoft Office including Word and Excel.
- Demonstrated ability to effectively communicate orally and in writing with individuals at all levels, both within and outside the agency.
- Good interpersonal communication, customer service and time management skills essential.

Employee Signature

Date