

Benefits Account Manager

Reports To: Client Services Manager

Status: Salaried Non-Exempt

Primary Responsibilities

Day-to-day maintenance and servicing of assigned Benefits accounts which includes both group and individual client. Tasks Include but are not limited to:

- Maintaining a high level of client service and satisfaction
- Marketing & placement of renewal accounts as appropriate
- Achieving agency account retention goals by providing extraordinary client service.
- Achieving agency growth goals through proactive account rounding and cross-selling.

Duties

- Support Producers' sales efforts by handling accounts once bound
- Perform annual review and risk exposure analysis of renewal policies for proper coverage, incorporating information obtained from client
- Maintain client files and ensure proper documentation, by processing all policies, endorsement changes, invoices, binders, certificates of insurance, documentation, activities, etc., according to agency procedures, and within agency timelines
- Maintain control of renewal expiration lists, binders, and any aged receivables in accordance with agency guidelines.
- Respond to client inquiries, incoming e-mail, mail, and company requests in accordance with agency guidelines
- Review all items to be processed, to insure items were received as ordered.
- Participate in courses for insurance/sales skills. Maintain current knowledge of underwriting requirements of carriers. Keep current with industry trends by reading appropriate journals and company bulletins.
- Participate in any special projects at management's request.

Qualifications & Education

Preferred:

- Appropriate State license(s). Minimum 3 years' insurance brokerage or equivalent experience. Completion of CISR or CIC designation; currently enrolled in INS or API program.
- Two-year associate college degree required; four-year college degree preferred
- Extensive knowledge of all lines of personal insurance, including sophisticated and less common coverages, especially those products represented through agency
- Thorough knowledge of brokerage operations including claims handling, procedures, personal lines rating, agency management system, and applicable insurance laws/codes.
- Familiarity with risk assessment and risk management techniques

Required:

- Experience and expertise in operating in electronic environment; excellent automation skills, including MIS, Outlook, Word, Excel, document management software, carrier proprietary systems, and phone systems
- Excellent time management, organizational and verbal and written communication skills
- High degree of self-motivation and self-direction

About Main Street Insurance Group:

Main Street Insurance Group has been in business for 120 years, with our roots dating back to 1898 and to three small North Carolina communities. Today, we work with a wide variety of individuals and businesses in Charlotte, Forest City, Tryon and throughout the Southeast.

Collectively, we have decades of experience in creating customized solutions for our personal insurance, business insurance and employee benefits clients, with our specialties in [Business Insurance](#), [Home Insurance](#), [Auto Insurance](#), [Employee Benefits](#) and [Equine Insurance](#).

We're an independent insurance agency offering a comprehensive suite of insurance solutions to protect your business and your life from the unexpected. We don't just sell insurance. We work closely with clients to help them make important and informed decisions every day when it comes to protection and their future.

How to apply: Go to our website and apply; here is the link:

<https://mainstreetins.com/about/careers/>