

Commercial Lines Account Manager

Department: Commercial Lines (CL) Insurance
Reports To: Office Manager
Supervises: None

Job Description:

The CL Account Manager is responsible for providing assistance to new and existing commercial insurance customers. In addition, the Account Manager will maintain client information in AMS360 insurance database and perform other office administrative functions.

Primary Job Functions may include:

- Opening and preparing office for daily work, including opening and distributing mail.
- Providing efficient and courteous customer service, in-person and on the phone.
- Processing new/renewal business, including reviewing for accuracy, collecting email addresses and invoicing.
- Corresponding with company underwriters, negotiating insurance pricing and coverage based on personal knowledge or at Producer's request.
- Receiving and recording payments, then forwarding to correct companies; balancing cash drawer and preparing bank deposit.
- Processing all activities, including new claims, claim updates, endorsements, renewals & cancellations in our agency management database system- AMS360.
- Processing submissions for new and remarketed business and sending appropriately to designated companies.
- Reviewing assigned client files at expiration and addresses coverage gaps in order to protect our clients' assets and retain our existing business.
- Review renewal lists with and providing support to the Producers, including providing renewal information to the client as needed.
- Requesting and sending loss runs to designated requesters.
- Complete appropriate Certificates of Insurance and Evidence of Property as needed.
- Scanning and attaching non-downloading policies, emails and audits.
- Filing documents in timely manner and keeps computer files up to date.
- Following and being familiar with Procedures Manual and attending company meetings.
- Making referrals to other LifeStore divisions through CRM.
- Keeping current on requirements for NC insurance license continuing education.
- Adheres to all company and compliance policies and procedures.

Minimum Qualifications

- High School diploma or equivalent.
- P & C license or willingness to obtain within 90 days.
- Strong verbal and written communication skills with attention to detail.
- Interpersonal skills to build and maintain professional supportive relationships with customers and team members.
- PC and keyboarding skills, including experience with Windows operating systems.

Job description and duties may be modified when deemed appropriate by management.

Employee: _____ Date: _____

If you'd like to apply, contact:

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