

Job description for: Account Associate

REPORTS TO: Chief Operating Officer

STATUS: Non-Exempt

SALARY RANGE: \$15-19 Hourly

JOB SUMMARY:

The Account Associate performs the essential functions of the position, which include aiding Account Managers, Client Executives, and clients with specific service needs and making changes to existing accounts. Specific service and marketing responsibilities are learned in this position. Special Projected may be assigned on an as needed basis.

PRIMARY RESPONSIBILITIES:

- Provides technical support to Account Manager(s); specifically, in preparing Certificates and Evidences of Property,
- Prepares Proposals, Renewal Reviews, and Insurance Schedules for use by Account Managers and Client Executives with prospects and clients,
- Prepares final copies of proposals and readies presentations for delivery including the printing, compilation and binding of materials,
- Assists in processing and service work performed on accounts as directed by the Account Manager(s),
- Completes applications/data entry in coordination with Account Manager(s),
- Processes incoming mail, email and phone requests, responding promptly and appropriately,
- Performs various additional support functions including issuance of Auto ID Cards, endorsement request and processing, cancellation and non-renewal documentation and follow up, quotation checking and analysis, flood zone determination, invoicing, loss run summaries, experience modification calculation and other service related duties as assigned.

PERSONAL AND ORGANIZATIONAL DEVELOPMENT:

- Sets priorities and manages work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Maintains a cordial and effective relationship with clients, co-workers, carriers, vendors and other business contacts.
- Keeps informed regarding industry information, new product information, legislation, coverages and technology to continuously improve knowledge and performance.
- Interacts with others effectively by utilizing good communications skills, cooperating purposefully and providing information and guidance, as needed, to achieve the business goals of the agency.

KNOWLEDGE, SKILLS AND ABILITIES:

- High School education or equivalent with a minimum of 2 years' insurance experience.
- Property & Casualty Insurance License, or the ability to obtain within the first 2 months (60 days) of employment.
- Ability to analyze complex insurance situations, needs and options and communicate these options both verbally and in writing in a clear, concise manner.
- Ability to understand written and oral communication, and interpret abstract information
- Introductory knowledge of insurance products and usages.
- Introductory knowledge of insurance markets and reference to markets.
- Introductory knowledge of insurance rating and underwriting procedures.
- Ability to carry out complex tasks with many concrete and abstract variables.
- Strong computer skills with and familiarity with tools such as Outlook, Excel, Word and AMS
- Ability to manage complex projects simultaneously.
- Ability to work independently of Account Manager and take the lead on specific elements of client servicing when necessary.

WORKING CONDITIONS:

- Fast-paced environment
- Large number of multiple steps in complex system performed with accuracy and speed is essential to the successful completion of tasks

Any other duties as requested

Applicants will be tested.

Applicants can apply to Nicole Winkle at nwinkle@sentinelra.com or reach her at 919-926-4623.