

**MOLYNEAUX** AssuredPartners  
**Commercial Lines Account Manager**

Edition: 09/2020

**Department:** Commercial Lines  
**Reports to:** VP of Operations  
**FLSA Status:** Overtime Eligible

**Purpose:**

Provide technical support to Account Executives (AEs) in providing sales and service of property and casualty insurance to clients in accordance with the objectives and procedures outlined by the organization.

**Essential Duties/Responsibilities** include the following. Other duties may be assigned.

- Provide service to the client regarding their insurance policies.
  - Review contracts, leases and agreements for clients to determine insurance coverage.
  - Answer coverage questions.
  - Issue proof of insurance.
  - Make changes to policies (endorse) as instructed by the client.
  - Assist the client in solving insurance problems.
  - Communicate with insurance company personnel on behalf of clients.
  - Discuss problem situations, possible solutions and other pertinent conversations with Account Executives (AEs) regarding clients.
- Maintain and monitor expiration lists and update existing summaries.
  - Obtain renewal information from the client and the AE.
  - Prepare new summaries and order appropriate changes for renewal quotes.
  - Market accounts as assigned, and offer coverage suggestions to the AE for the client.
  - Review new business and renewal quotes from insurance companies as assigned.
- Update the agency's database for each client as activity occurs.
  - Review follow-up lists for pending activities.
  - Send emails, faxes and letters and set appropriate activities to follow up.
  - Invoice and review for accuracy all endorsements, audits and policies received from carriers.
  - Follow agency protocol regarding workflow processes.
- Assist other Account Managers when necessary.
- Pursue a program of personal and professional development as approved.
- Delegate to the Account Manager Assistants when possible and as workload dictates.

**QUALIFICATIONS**

To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

## **KEY PROFESSIONAL SKILLS AND ABILITIES**

- Perform job duties with a high degree of accuracy and efficiency.
- Perform arithmetic calculations, including online rating of Property & Casualty insurance policies.
- Analyze property & casualty insurance coverages, forms, and policies.
- Learn and adapt successfully to new technology.
- Organize and manage a challenging workload with proper prioritization.
- Demonstrate helpful, responsive, customer service with all internal and external customers.
- Work independently and as part of a small integrated team.
- Use professional communication and follow-up.
- Demonstrate good documentation skills and attention to detail.
- Meet service standards as established by the agency.
- Complete the described duties through the use of agency system software programs.
- Align job performance with agency Core Values

## **EDUCATION**

- College degree or equivalent training and/or experience preferred.
- Professional insurance designation or working toward

## **LICENSING and CERTIFICATION**

- Insurance Agent's License for resident state.

## **WORKING HOURS and TRAVEL**

- Full Time position
- Average no more than 1-2 out of town trips per year to attend training sessions