

Job Description

Personal Lines Account Manager

Job Summary

The Personal Lines Account Manager's main responsibility is to produce quotes for prospective customers. Closely following this duty is the critical responsibility of servicing and maintaining existing policies, which includes performing a variety of administrative roles. The Personal Lines Account Manager performs other general tasks as needed such as: performing personal insurance reviews, receiving and processing payments, and answering phones.

Job Duties

- Quote, sell, and issue new policies (50%)
 - Must have a thorough understanding of underwriting guidelines, rules, and regulations
 - Research best insurance company for needs
- Servicing existing policies (45%)
 - Make policy changes
 - Perform research
 - Provide proof of insurance
 - Track down documentation as needed
 - Handle billing needs
 - Facilitate binder requests
 - Answer general questions
 - Calling and following up with claims
- Perform other tasks as needed (5%)
 - Perform PIR's (Personal Insurance Review)
 - Answer phone calls
 - Receive and process payment
 - Bind and mail commercial policies
 - Other duties as assigned

Job Requirements

Physical: Able to lift, pull, push, and carry up to 10 pounds. Able to sit/stand at desk for extended periods of time.

Top 10 Competencies: Work Ethic, Excellence, Customer Focus, Adaptability, Team Player, First Impression, Stress Management, Analysis Skills, Listening, Verbal Communication

Education: High school diploma or equivalent; valid driver's license; licensed in Property and Casualty Insurance