

Commercial Lines Account Manager
Job Description

Job Title:	Commercial Lines Account Manager
Department:	Commercial Lines
Reports To:	Commercial Lines Team Leader
FLSA Status:	Exempt

At Leavitt Elite Insurance Advisors (LEIA), we believe peace of mind comes from achieving your desired quality of life, reaching financial success, and preparing for life's uncertainties. We expect excellence by applying our best attitude, desire, and effort to all we do. We deliver on promises and go the extra mile to meet and exceed expectations. We encourage a relentless commitment to education and development, innovative creativity, and forward-looking collaboration to deliver cutting edge solutions to those we serve. We hire skilled, motivated, and happy people who work together in an atmosphere of teamwork, loyalty and mutual respect. We build relationships and earn trust by never compromising our honesty or integrity for short- or long-term gain. Doing the right thing is always the right thing.

SUMMARY

The Commercial Lines Account Manager is responsible for day-to-day account management for clients with complex coverage needs including coverage/policy questions, claims handling, and providing high customer service satisfaction. The ideal Commercial Insurance Account Manager will possess a wide range of commercial lines account management skills, including but not limited to: customer service, administration, and sales. The position requires experience managing both small and large commercial accounts and a strong understanding of the underwriting process including new and renewal business.

RESPONSIBILITIES AND DUTIES include the following:

- Receive phone calls from clients and companies and comply with the request and/or refer to the producers.
- Request renewal information from insured and send out apps if necessary.
- Amend submission applications per insureds updated.
- Contact insured for updated renewal information at least ninety (90) days in advance and/or as directed by producer.
- Service commercial accounts to prevent a gap and/or lapse in coverage, thus reducing our E&O exposures.
- Support and assist insured with claims processing and inquiries.
- Make personal contact with the marketing department to obtain the best markets for all new and renewal business. Perform or request all necessary ratings sufficient for policy quotes and/or issuance.
- Prepare binders, certificates, endorsements, policies, lost policy releases, loss run requests and account balance status when requested.
- Maintain AMS360 platform with updated client policy information and attachments.
- Accounting: Send carrier payables to accounting, agency billing to client
- Assist clients with policy changes.
- Work with Personal lines for commercial clients.

- Communicate with supported Producer(s) on a regular basis to keep them updated on client activity.

OTHER DUTIES/RESPONSIBILITIES:

- Stays abreast of trends and products, pricing, and competitive markets.
- Participate in seminars and other training to maintain required licenses and for knowledge and skill development.
- Solicit business from new/referral sources.
- Ensure that all out-of-state business, the writing company is the winner of non-resident encounter signature arrangement in the state where the risk is located.

REQUIREMENTS:

- Full-time position
- Adheres to the Leavitt Elite Governing Principles
- Adheres to Company Policies and Procedures as set forth

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.

EDUCATION and/or EXPERIENCE

Education: High school diploma or general education degree (GED)

Experience: 2-3 years of Customer Service/Sales skills in the Insurance industry desirable. Prior Commercial Lines Account Manager experience a plus.

COMPUTER SKILLS

Knowledge and use of Microsoft Word and Excel. Typing skills or prior data input experience is mandatory. AMS360 knowledge a plus.

CERTIFICATES, LICENSES, REGISTRATIONS

License: Have a valid, in force driver's license with an MVR acceptable to the agency. Requires a NC resident Property & Casualty License. Nonresident licensing may be required.

Continuing Education: Attend insurance classes that will increase understanding of the industry and satisfy state licensing CE requirements. Participate in company training classes as required.

EMPLOYER'S RIGHTS

This job description does not list all the duties of the job. You may be asked by your supervisors or managers to perform other duties. You will be evaluated in part based upon your performance of the

tasks and functions listed in this job description. The employer has the right to revise this job description at any time period the job description is out of contract for employment, and either you or the employer may terminate employment at any time, for any reason.

Note: The statements herein are intended to describe the general nature and level of work performed by employees, but are not a complete list of responsibilities, duties, and skills required of personnel so classified. Furthermore, they do not establish a contract for employment and are subject to change at the discretion of the employer.