

Personal Lines Account Manager
Job Description

Job Title: Personal Lines Account Manager
Department: Personal Lines
Reports To: PL Team Leader
FLSA Status: Non-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 Personal Lines Account Manager is responsible for providing excellent customer service; assisting clients with sales and servicing needs and making changes to existing accounts; meet service and sales delivery standards; and performs the essential job functions to the quality and service standards developed by the agency.

This position handles the processing of new and renewal personal lines business. A positive attitude is required along with a high level of support in obtaining, maintaining, expanding, and servicing our personal lines accounts.

RESPONSIBILITIES AND DUTIES:

- Accurately maintain all customer information in our agency management system and adhere to agency processes and procedures of proper documentation.
- Responsible for maintaining knowledge of carrier guidelines, underwriting requirements, binding authority, policy forms, and endorsements.
- Assists customers with their personal lines sales and servicing needs by:
 - Providing excellent customer service of supported accounts.
 - Assisting in the collection of premiums and reconciliation of accounts as needed.
 - Issuing the proper insurance verification documents to the insured and adhering to carrier guidelines for processing and follow ups.
 - Speaking with company personnel on behalf of the customer for any written and electronic correspondence requests.
 - Performs timely quoting, placement, and proposals of new and renewal personal lines business.
 - Conducts thorough coverage reviews with clients recommending coverage changes, multi-lining of accounts, and remarketing where necessary.
 - Claim gathering and assists with filing the loss with carriers.

- Maintains assigned daily suspense's / to do tasks listed in the Agency Management System and Agency Zoom.
- Provides support of all teammates where needed.
- Performs special assignments as requested by management.
- Attends carrier training sessions as directed by the Agency (zoom or in person).
- Attends a weekly meeting with your team conducted by your Team Leader.
- Promotes and enhances the fiduciary responsibilities and reputation of the Agency.
- Ensures security of all client's information and agency proprietary information.

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: Insurance sales and service experience preferred, but not required

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 Personal Lines or Property & Casualty License (P&C preferred).

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.