



Job Description

Job Title: Client Service Representative

Department: Property & Casualty

Reports to: Team Leader

Status of Position: Exempt

Essential Duties and Responsibilities

- Assist Account Executive in marketing and servicing clients within the account team
- Build relationships with clients and have the ability to answer basic insurance questions
- Maintain appropriate business contact with client
- Assist with issuing insurance binders
- Process invoices for both new and renewal policies
- Process change requests from client, setting an activity for receipt of the endorsement from the insurance carrier
- Process received endorsements, check for accuracy, invoice and send to client with clear explanation of change
- Check and invoice premium audits. Send to client with clear explanation of additional or return premium
- Update the Applied system and the shared drive to reflect changes during the coverage term
- Order loss runs for renewal submissions and prepare loss summaries
- Generate ID cards and certificates of insurance
- Complete surplus lines filings
- Complete preliminary policy checking for all accounts and submit change requests to the underwriter
- Renew binder extensions
- Follow up on open activities
- Obtain premium finance quotes
- Obtain flood zone determinations and NFIP quotes where applicable
- All other duties and projects as assigned

Supervisory Responsibilities

Does this position include any supervisory responsibilities?

Yes No

Educational Requirements

High School Associate Degree **College Graduate** Other: **Brokers License**



Work Experience

- 2-3 years of insurance experience

Technical Skills

- Basic knowledge of Property and Casualty insurance coverage.
- Proficiency in Microsoft Outlook Word, Excel and PowerPoint.
- Ability to navigate vendor or agency management systems as applicable.
- Proficiency in Applied or ability to learn this program.
- Knowledge of Adobe Acrobat is a plus.
- Ability to manage client needs and multiple tasks.
- Good organization skills.
- Attention to accuracy and detail.

Physical Demands

- May require lifting up to 25 pounds.

Travel Required

- **Yes** **No**

If yes, what percentage of the time? **Less than 10% of time**

Additional Requirements

- Excellent interpersonal skills and a pleasant disposition required at all times.
- Ability to work well with others in a fast-paced environment.
- Team player.

Completed by: _____

HR Approval: _____

Employee: _____

Date: _____

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