



## **Job Description**

**Job Title:** Account Executive

**Department:** Property & Casualty

**Reports to:** Team Leader

**Status of Position:** Exempt

## **Essential Duties and Responsibilities**

- Lead Client Service Representatives in servicing clients within the account team
- Build relationships with assigned clients and give prompt attention to their requests
- Maintain appropriate business contact with client
- Work directly with Producers to discuss client's future insurance needs
- Responsible for the pro-active marketing and servicing of accounts with multiple lines of coverage
- Must have a thorough understanding of Builders Risk Programs, Wrap-Ups, OCIPs, CCIPs and large casualty loss-sensitive programs.
- Understand the clients' business and risk profiles, utilizing this information to prepare insurance specifications.
- Communicate the clients' needs to their insurance carriers and identify new trends and developments
- Prepare insurance proposals, outlining significant terms and conditions
- Offer appropriate coverage including policies that are not currently purchased by the client, to eliminate the potential for uninsured claims
- Check policies against quotes for accuracy, and request changes where needed
- Utilize the Applied system and the shared drive to maintain client information
- Assist in organizing pre-renewal and renewal meetings, and coordinating claims reviews, as needed
- Research available insurance products and policies that may be appropriate for clients, utilizing vendor relationships within the insurance marketplace
- Understand surplus lines and filings
- Assist the accounting department with billing discrepancies, when necessary
- 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**

- At least **10** years of insurance experience in the P&C field.

## **Technical Skills**

- Strong 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? **Up to 25% 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.
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