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.