



## Job Description

**Job Title:** Client Service Representative

**Department:**

**Reports to:** Team Leader

**Status of Position:** Exempt

### Essential Duties and Responsibilities

Outline the major job duties and responsibilities for this position. Begin with the most important.

- Submission Preparation – information request and follow ups with insured. Preparing Acord Applications, Loss Summaries and SOV's.
- Proposal Preparation – helping prepare proposals and program comparisons for the insureds.
- Transition of Accounts – updating electric files and Applied
- Assist Account Executive in marketing and servicing clients within the team.
- Build relationships with clients and have the ability to answer basic insurance questions.
- Assist with issuance of insurance binders
- Generate invoices for both new and renewal policies.
- Process change requests from client, setting and activity receipt of the endorsement from the insurance carrier.
- When endorsements are received, check for accuracy, invoice and sent to client with clear explanation of change.
- Check and invoice premium audits.
- Update Customer's applied application to reflect renewals, endorsements, invoices and policy specifications.
- Order loss runs for renewal submissions and prepare loss summaries.
- Generate ID cards and certificates of insurance.

### 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 Word, Excel and Outlook.
- Proficiency in Applied or ability to learn this program.
- Proficiency in Adobe Acrobat-or ability to learn this program.
- Knowledge of PowerPoint is a plus.
- Ability to manage client needs and multiple tasks.
- Good organization skills.
- Attention to accuracy and detail.

## Physical Demands

- May require lifting packages up to 25 pounds

## Travel Required

Yes No

If yes, what percentage of time? **Up to 10% of time**

## Additional Requirements

- Excellent interpersonal skills in order to interact professionally with clients, underwriters, customer service representatives and account assistants.
- Ability to work well with others in a fast paced environment.
- Team player.

**Completed by:** \_\_\_\_\_

**HR Approval:** \_\_\_\_\_

**Employee:** \_\_\_\_\_

**Date:** \_\_\_\_\_