

Position Description

Functional Job Title: Assistant Account Manager

Reports to: Account Executive/Team Leader

Department/Branch: Commercial Lines/Insurance Agency/Virginia Beach, VA

Date: August 1, 2015

Primary Purpose: Provide professional service to new and existing clients by assisting the account executive/team leader and process their requests in a timely and accurate manner.

Essential Responsibilities:

- Assist with processing endorsement requests, cancellations and reinstatements.
- Quote and print finance agreements as needed.
- Attach and bookmark insurance policies in Epic.
- Assemble client's insurance policies for delivery.
- Process and issue certificates.
- Obtain loss runs, endorsements, billing, etc. from carrier websites.
- Assist account managers in billing of policies, audits and endorsements.
- Attend office/team meetings as necessary.
- Participate in carrier website training when scheduled.
- Handle other duties as assigned.

Minimum Required Skills and Competencies:

- Attention to detail
- Strong telephone skills
- Cheerful personality
- Dependability and punctuality
- P&C License - if not currently licensed must obtain within first 30 days of employment
- Microsoft Products experience (Outlook, Word, Excel)

Desired Skills and Competencies:

- Prior insurance experience
- Prior Experience working with insurance software, preferably Applied Systems