

PROPERTY & CASUALTY - COMMERCIAL LINES ASSISTANT CLIENT MANAGER

JOB DESCRIPTION

Provide assistance and support to Client Manager(s) in servicing new and renewal business. Promptly and professionally assist clients with daily service needs. Regular interaction with producers, account executives, account managers and carrier representatives to deliver a superior client service experience.

REPORTS TO

Client Executive—Team Leader

ESSENTIAL FUNCTIONS

- Obtain Ohio Property & Casualty Insurance License within 90 days of hire
- Adhere to all agency procedures and E&O guidelines.
- Maintain the integrity of all electronic files by documenting all activity correspondence, phone calls, faxes, emails, and request for changes, etc.
- Provide technical support to client managers, client executives and producers.
- Participate in special projects and other duties assigned.
- Prepare binders, certificates, auto identification cards, endorsements, policies, and lost policy release, as needed.
- Prepare invoice transactions including preparation of finance agreements.
- Preparation of insurance summaries
- Assist client managers, client executives and producers to prepare submissions for renewal business within 90-120 of policy expiration.
- Check new and renewal policies, endorsements and audits for accuracy and rating, typing, coverages and forms.
- Assist Client Manager in maintaining his/her expiration log of existing book of business.
- Exhibits proficiency in using the agency management system, per TFG's written workflows.

COMPETENCIES

- Ethical Conduct
- Strong Computer Skills
- Strategic Thinking
- Decision Making
- Communications Proficiency
- Presentation Skills
- Flexibility



- Adaptive Nature
- Prioritizing/Time-Management

SUPERVISORY RESPONSIBILITY

None

WORK ENVIRONMENT

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, cell phones, photocopiers, filing cabinets and fax machines.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; and taste or smell. The employee must occasionally lift or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

POSITION TYPE/EXPECTED HOURS OF WORK

Full Time Position – 40-hour work week

TRAVEL

Travel is minimal, although some out-of-area and overnight travel may be expected

REQUIRED EDUCATION AND EXPERIENCE

- High School diploma or GED

PREFERRED EDUCATION AND EXPERIENCE

- Bachelor's Degree
- Experience using Applied EPIC agency management system
- Active Ohio P&C license or Pending
- Development of knowledge of commercial lines coverage

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

