

Associate Account Manager – Position Description

Reports to: Operations Manager

Position Summary:

Integral part of an Account Management Team on assigned accounts, managing key processes that serve clients and undertaking the client-facing and internal activities related to these processes.

Role/Responsibilities:

- Issue Certificates of Insurance
- Audit processing
- Process Endorsement Requests
- Report Claims to Carrier
- Set up CSR24 Portal for Clients
- Follow-up on renewal information requested from client
- Retrieve policy documents from carrier portals
- Pull loss runs or any other information requested by Account Manager for pre-renewal process
- Quality checking policies and endorsements
- Use the Applied EPIC system to maintain a current suspense system, by use of Activities
- Use the Applied EPIC system to document all transactions and communications
- Utilize company interface programs as respects rating, policy and endorsement processing. Attend training sessions, if needed, to keep current on these programs
- Attend continuing education classes to maintain Property & Casualty license
- Maintain a professional demeanor and follow the Code of Ethics as set forth by the agency
- Contribute to a positive work environment
- Apply solid knowledge of major insurance coverages
- Act with responsiveness, urgency, and professionalism in all client matters
- Accept accountability for your quality of work and the work of the team
- Perform additional assigned duties as requested

Qualification Requirement:

- 1-2 years commercial insurance experience preferred
- High School Diploma required, college degree is a plus
- Property and Casualty License for the state of Oregon required
- Refined verbal and written communication skills
- High level of computer literacy, including working knowledge of Office products.
- Contribute to a positive work environment.

Physical Demands:

- Able to sit for long periods of time, use repetitive small motor activity, use hands and fingers, and reach with hands and arms.
- Occasional lifting up to 20 lbs.

I have read this job description and fully understand the requirements set forth therein. I understand that this is to be used as a guide and that I will be responsible for performing other duties as assigned. I further understand that this job description does not constitute an employment contract with RiskPoint Insurance Advisors, LLC.

Employee Signature

Date Signed