



Professional Liability Producer – Position Description

Reports to: President

Position Summary:

The Producer will be primarily responsible for prospecting, networking, and producing new professional liability business insurance policies and accounts as well as the renewal and retention of existing accounts. This position will work independently and focus on providing solutions to help customers in the Real Estate, Legal, and Financial Services industries on a national basis.

Role/Responsibilities:

- Create and execute a new business plan utilizing the branded sales toolkit to win new business.
- Solicit and write new policies; actively identify and act on cross-selling opportunities; prospect and generate new business through leads and referrals.
- Build intentional relationships inside and outside the community with future sales in mind.
- Provide superior customer service as a point of contact for carriers and clients.
- Educate and advise clients' regarding all pertinent aspects of coverage, assessing needs and exposures, and recommending insurance solutions where appropriate.
- Obtain information for quotations and market account to various insurance carriers with assistance of support staff.
- Ensure arrangements with client regarding timely premium payment and payment collection, if necessary.
- Effectively build relationships with insurance company underwriters through a pattern of professional risk submissions, company visitations, and negotiations
- Work with the Account Managers to complete pre-underwriting, information gathering, submissions, coverage analysis, and proposal presentations if needed.
- Accurately maintain prospects, new, and renewal business in the agency management system and CRM database to allow for proper analysis of trends when gaining or losing business; work with executive management to continually analyze and strengthen areas of opportunity.
- Remain current in the commercial marketplace: carriers, underwriting requirements, lines of coverage, compliance, etc.
- Additional duties as assigned.

Qualification Requirement:

- Must possess a current Property & Casualty Licenses in the state of Oregon.
- Bachelor's degree is preferred.
- 3+ years of progressively responsible experience in an insurance sales position or similar environment.
- Must have thorough knowledge of all insurance lines.
- Independent self-starter able to sell and develop strong business-to-business relationships
- Ability to perform multiple tasks in complex working environment accurately and efficiently.
- Possess above average computer knowledge and skills.
- Strong communication skills and ability to interact with internal and external partners

- Work well under pressure in a fast-paced environment; ability to shift priorities at a moment's notice

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