



**NAME:**

**POSITION TITLE:** Account Manager

**SUPERVISOR/REPORTS TO:**

**DEPARTMENT:** Louisville Office

**PURPOSE:**

To provide assistance to producers in handling and processing of new and renewal personal lines and small business in accordance with Agency procedures and guidelines; to provide customer service to clients as assigned and requested. Provide, with a positive attitude, a high level of support in obtaining, maintaining, expanding, and servicing commercial accounts.

**RESPONSIBILITIES:**

- Provide positive, prompt, accurate, and courteous service to clients.
- Receive phone calls from clients and companies regarding insurance, claims, or administrative needs, and comply with the request and/or refer to the producer when necessary.
- Be familiar with and follow agency E&O guidelines and service personal lines accounts in a manner to eliminate gaps in coverage, thus reducing our E&O exposures.
- Maintain electronic files in an orderly, up-to-date manner.
- Perform special projects at management's request.
- Review all applications, policies, endorsements, and audits for accuracy.
- Setup and prepare new account files per agency procedures.
- Keep current on rates, forms and coverage changes through circulars, bulletins, trade publications, seminars, and schools offered.
- Participate in seminars and classes for skill and knowledge development.
- Prioritize work load and/or request for assistance as required.
- Assist other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client.
- Meet with clients to discuss and handle their insurance needs.
- Keep producers fully informed of all important activities on their accounts.
- Assist other departments and producers in cross selling and account rounding.
- Maintain all client activity in AMS 360 and follow procedures
- Follow workflow and agency procedures
- Assist in New Business workflow
- Receive change requests for endorsements
- Perform other related duties as assigned.

**REQUIREMENTS:**

- Experience: At least two (2) years' experience in similar position is desirable.
- Education requirement: College degree preferred. High school diploma or equivalent (GED) is required.
- Must be licensed per state requirements.
- Must be able to understand and analyze personal lines insurance coverage's, forms, procedures, and policy rating systems.
- Should have thorough understanding of personal lines underwriting and coverages.
- Must desire to acquire advanced insurance designations.
- Must be proficient in a variety of computer software applications in word processing, spreadsheets, database, and presentation software (MSWord, Excel, Outlook, Access, PowerPoint).



- Proficient in AMS 360 insurance software.
- Professional designation is a plus.

The above noted job description is not intended to describe, in detail, the multitude of tasks that may be assigned, but rather to give the associate a general sense of the responsibilities and expectations of the position. As the nature of business demands change, so too may the essential functions of this position.

**HIRE DATE:**

**STATUS:** Exempt (salary) or Non-exempt (hourly)

**SALARY:**

**AMERICANS WITH DISABILITY SPECIFICATIONS**

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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; taste or smell. The employee must occasionally lift and/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.

Work Environment

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is not exposed to weather conditions. The noise level in the work environment is usually moderate.

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Employee's Signature Date

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Supervisor's Signature Date

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Human Resource's Signature Date