



## JOB DESCRIPTION

**POSITION TITLE:** Assistant Account Executive

**REPORT TO:** Client Services Supervisor

**TOTAL COMPENSATION:** \$75,000-\$95,000 (subject to experience, education, and designations)

### PRIMARY OBJECTIVE:

To actively participate in a team, assisting assigned Account Executives in coordinating and helping CRS clients.

### PREFERRED POSITION QUALIFICATIONS:

- Adhere to CRS Core Values and Code of Ethics
- Good working knowledge of Agency Management System
- Property and Casualty license with a strong understanding of coverages
- Have or be working on obtaining the CIC designation
- Work well with CRS staff and management
- Detail-oriented and strong organizational skills

### DUTIES & RESPONSIBILITIES

- Adherence to CRS Core Values & Code of Ethics.
- Be proficient at rating and utilizing various insurance company programs.
- Compare and update vehicle/equipment lists (expiring to renewal).
- Complete pre-renewal files.
- Assist with the following during the renewal process:
  - Meet with Producer & AE 120 days prior to expiration to determine the renewal strategy.
  - Prepare the renewal submission file and pre-renewal packet.
  - Update the applications on the system and other information needed in the renewal submission file.
  - Submit the renewal file to markets, communicating with the underwriters to secure the quotes by the date needed.
  - Prepare the Marketing Summary of the quotes and review them with the Producer.
- Complete 9-column on assigned accounts.
- Work Comp comparison.
- Complete the expiring annualized premium spreadsheet as requested.
- Assist in collecting needed renewal information; send expiring and updated applications to client for review, following up by need by date.
- Assist Account Executive/Producer on creating and obtaining documents and reports necessary for new & renewal business submissions and program review.
  - Provide Mod Master analysis as requested.
  - Provide Building Replacement Cost estimations as requested.
- Create the applications in system with direction from Account Executive and prepare a complete submission file, then market to carriers needed.

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This Job Description is not a complete statement of all duties and responsibilities comprising this position. Job duties are considered minimum requirements for the position.



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- Update Renewal Supplemental Applications in comparison to expiring.
- Communicate with prospects and underwriters to secure quotes by the date needed.
- Review quotes & present recommendations to Producer.
- Negotiate pricing or terms as needed.
- Prepare the proposal as discussed with the producer.
  - Updating, printing, and binding, including enhancements.
- Assist teams in reviewing and analyze insured's contracts regarding insurance requirements and program compliance.
- Other duties as needed or assigned.