



JOB DESCRIPTION

POSITION TITLE: Assistant Account Manager

REPORT TO: Service Team Lead

TOTAL COMPENSATION: \$50,000 - \$70,000 (subject to experience, education, and designations)

PRIMARY OBJECTIVE:

With little supervision, performs service for our customers and assists other teams as assigned. Exercise a high degree of professionalism. The ability to be responsible for handling the needs of existing and potential clients. Assist teams in developing current accounts as well as obtaining and processing new business.

PREFERRED POSITION QUALIFICATIONS/BEHAVIORS:

- Adherence to CRS Core Values & Code of Ethics
- Two to five years of similar or related experience preferred
- Bachelor's Degree preferred or experience in lieu of a degree
- Strong written and verbal communication, a high sense of urgency, and the highest attention to detail
- Have a Property & Casualty license
- Have CISR designation within 3 years and working towards CIC
- Must be knowledgeable in commercial lines coverages
- Familiar with company guidelines and underwriting rules
- Excellent organizational skills

DUTIES & RESPONSIBILITIES:

Responsible for account servicing needs, direct with client, during the policy year, including but not limited to the following:

- Adherence to CRS Core Values & Code of Ethics
- Certificates of Insurance
- Auto ID cards
- Endorsements /change requests
- Data entry (clients, applications, policy info)
- Binders
- Renewal processing
- Cancellations
- Audit review, processing, follow up and collection
- Invoicing (direct bill and agency bill)
- Other duties as assigned

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.