



POSITION TITLE: Personal Insurance Advisor
REPORTS TO: Director of Business Development
SALARY RANGE: \$55,000- \$75,000 (subject to experience, education, and designations)

PRIMARY OBJECTIVE:

With little supervision, performs service for our customers and assistance to personal lines customers as assigned. Must exercise a high degree of professionalism. Responsible for handling the needs of existing and potential clients. Assist in developing current accounts as well as obtaining and processing new business. Also, to continually grow your book of business and contribute to the growth and profitability of CRS Insurance Brokerage with quality business.

PREFERRED POSITION QUALIFICATIONS AND BEHAVIORS:

- Be knowledgeable in personal line coverages and familiar with company guidelines and underwriting rules.
- Good communication, detail, prioritizing, and organizational skills.
- Must hold property and casualty producer license.
- Possess or in the process of obtaining CISR or comparable designation.

DUTIES & RESPONSIBILITIES:

Become familiar with general office procedures of CRS. Utilize the agency management system effectively and as instructed. Perform the following functions in accordance with agency policies and procedures:

- Adherence to CRS Core Values & Code of Ethics.
- Process renewals, endorsements, non-pay notices, reinstatements, cancellations, non-renewals, and claims (both download and non-download carriers).
- Advocate for the customer by communicating with underwriters, marketing representatives, and claims adjusters to solve any coverage or billing problems.
- Document all communications with client, carrier, and third parties as well as update, renew, and make policy changes on policies in Epic.
- Assist clients in making informed decisions through educating them in the claims process.
- Work expiration and renewal reports.
- Receive and Create communications with clients by phone, mail, fax, and email.
- Order policy changes online/email.
- Check new business policies for accuracy.
- Remarket accounts.
- Answer coverage questions that our clients may have.
- Quote scenarios on existing policies for customers as requested.
- Identify, develop, and secure new business for CRS (prospecting, marketing, selling).
- Develop comprehensive insurance plans for prospects and clients.

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.



- Servicing the assigned book of business.
- Maintain positive customer relations, conduct regular client stewardship meetings, and complete the CRS Customer Questionnaire.
- Prepare and finalize proposals.
- Coordinate and deliver the renewal to the client.
- Complete new applications and update renewal applications on the system.
- Present proposals to prospects and clients securing or renewing their business.
- Monitor account receivables, collecting receivables when necessary.
- Monitor outstanding audits and collect them when necessary.
- Negotiate premiums with underwriters.
- Work well with the CRS team and staff, assisting as needed.
- Be competent in CRS agency management system and follow inputting procedures.
- Meet annual sales and retention goals as established by management.
- Develop and maintain a growing, profitable book of business.
- Other duties as needed or requested.

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Job duties are considered minimum requirements for the position.

08/01/2023