



POSITION TITLE: Personal Lines Account Manager
REPORTS TO: Client Services Supervisor
SALARY RANGE: \$50,000- \$70,000 (subject to experience, education, and designations)

PRIMARY OBJECTIVE:

With little supervision, performs service for our customers and assistance to personal lines producers as assigned. Must exercise a high degree of professionalism. Responsible for handling the needs of existing and potential clients. Assist personal line producers in developing current accounts as well as obtaining and processing new business.

POSITION QUALIFICATIONS/BEHAVIORS:

- Be knowledgeable in personal lines coverages and familiar with company guidelines and underwriting rules.
- Good communication, detail, prioritizing, and organizational skills.
- Should hold property and casualty producer license.
- Have or obtain CISR designation.

DUTIES & RESPONSIBILITIES:

Become familiar with general office procedures of CRS. 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 client 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.
- Other duties as assigned.

01/01/2021

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.