



PERSONAL LINES ACCOUNT MANAGER

Job Responsibilities

- Manages a book of insurance business, while acting with a high degree of independent discretion, autonomy, and decision-making
- Provides professional, courteous service to our clients, carrier representatives, underwriters, business partners, and BGS colleagues, resulting in a rate of account retention that meets or exceeds expectations
- Handles account rounding and the development of new business as appropriate and in accordance with standard practices, policies, and procedures
- Makes major decisions independent of manager approval on books of insurance business for which the incumbent is responsible
- Oversees the preparation and implementation of all transactions, paperwork, and internal processing for assigned accounts
- Acquires understanding of clients' insurance objectives and critically analyzes and compares insurance plans to determine suitability
- Stays abreast of changes in the insurance industry and other external conditions that may impact their clients; makes appropriate recommendations to clients in response to those changes independent of manager approval
- Provides service and cross-sells account products for clients in the high net worth marketplace
- Acts as liaison between clients and insurance carriers to resolve escalated complex service issues that require policy interpretation and experience-based judgment to resolve; may also negotiate with underwriters and carriers
- Troubleshoots claims and billing issues
- Responsible for overall retention of accounts in assigned book of business
- Develops new business from existing accounts and assigned leads and contributes to meeting departmental production goals; identifies and follows-up on cross-selling opportunities when appropriate
- Manages, organizes, and conducts client meetings when necessary
- Appropriately documents conversations with clients and carrier representatives and updates all BGS computer systems and automated agency management systems when necessary; ensures the accuracy of data in those systems
- Prepares reports for management as required
- Attends industry related continuing education training and courses

Qualifications

- At least 3 years of experience and demonstrated proficiency in an insurance Account Management role
- Agency experience is required
- Experience working in the High-Net-Worth marketplace
- High School diploma or equivalent required, though college degree preferred
- Currently licensed (20-44 or 2-20) in good standing in required lines in Florida
- Current with all necessary CE credits in required lines and in Florida
- Excellent written and verbal communications skills
- Superior customer service and problem-solving skills
- Demonstrated proficiency with computer systems, including but not limited to Microsoft Office and automated agency management system(s)
- Ability to work in a team environment
- Ability to work a regular, full-time work schedule at BGS's office

