



YATES

Commercial & Personal Insurance, Benefits, & Bonds

Job Description

Title: CL Associate Account Manager

Classification: Non-Exempt

Department: Commercial Lines

Reports To: VP of Commercial Lines Operations

Summary:

Use knowledge of, and experience with, admitted and non-admitted commercial, construction, and product liability insurance; agency billing; and quotes, binders, and renewals of flood policies under the National Flood Insurance Program to perform administrative tasks including maintaining records, preparation of renewal proposals and summaries, and updating renewal applications in agency management system. Perform submission tracking, coverage terms analysis and premium comparison. Bind coverage with carrier and perform all related binding agency management procedures. Invoice each policy, negotiate payment terms, and establish payment method.

Prepare loss run experience summaries. Check new business and renewal policies to assess for risk management. Analyze insurance program. Back-up resource to complete all aspects of the endorsement process including requesting coverage changes to the carrier in writing; accurately updating agency management system with changes; check endorsement upon receipt from the carrier and request corrections as needed; invoice endorsement and update installment billing as needed; deliver endorsement to client with letter of explanation and invoice, as applicable. Check, process, and invoice insurance audits received from carriers. Contact underwriter and submit forms to obtain binder coverage. Ensure that policy requirements are fulfilled, including completion of appropriate forms. Telecommuting permitted.

Essential Functions:

- Process all elements of endorsements, including sending them to the carriers, reviewing to make sure they are accurate once received, as well as sending to the insured along with any billing/invoice if necessary.
- Process/review audits and monthly reports.
- Assist AMs with renewals - Order loss runs, update experience summaries, and run renewal updates.
- Policing checking.

Other Duties:

- May perform other duties as assigned.

Knowledge, Skills & Experience:

- Requires Georgia Insurance License and two (2) years of commercial insurance experience within an agency, broker, or insurer evidencing demonstrable ability to perform the stated job duties. Telecommuting permitted. New hires subject to background check.

Education, Licensing & Additional Requirements:

- High School degree or equivalent.
- GA Insurance Agent License.
- Insurance License Continuing Education.
- CIC, CISR designations

Supervisory Responsibilities: N/A

This position is eligible for the incentives stated in Yates LLC's Employee Referral Program.

_____ / / _____
Staff Member Signature Date

Disclaimer:

This job description indicates the general nature and level of work expected of the incumbent. It is designed to cover or contain a comprehensive listing of activities, duties or responsibilities required of the incumbent. Incumbent may be asked to perform other duties as required.