



# YATES

Commercial & Personal Insurance, Benefits, & Bonds

## Job Description

**Title:** Marketing Representative

**Classification:** Exempt

**Department:** Marketing

**Reports To:** VP Marketing

### Summary:

Marketing of new and renewal business accounts as assigned by marketing manager. Average size of accounts ranges from \$25,000 to \$125,000.

### Essential Functions:

- Use of market knowledge to submit accounts to best matching carriers based on account characteristics; may need some guidance as to which markets to approach
- Work directly with carrier underwriters to negotiate best available policy terms, coverages, and premiums.
- Review and compare carrier quotes and discuss options with producer.
- Prepare proposals for producer presentations.
- Complete the binding process upon direction from producer or account manager.
- Update account information in Agency Management System (EPIC) based on bound coverage and communicate to account manager once completed.
- Assist Select group on accounts that may not fit Select unit.
- Attend carrier/underwriter meetings during agency visits.

### Other Duties:

- Periodically attends Company functions or meetings.
- Other duties as assigned.

### Knowledge, Skills & Experience:

- Above average computer skills and technical knowledge.
- Prior Commercial Insurance Carrier or Agency experience – preferably 3 or more years.
- Experience with agency management systems. Ability to adapt to various systems.
- Excellent time management and organizational skills.

### Education, Licensing and Additional Requirements:

- College degree preferred. Degree in Insurance, Finance or Marketing preferred.
- Must have current agent license, insurance designations a plus.

