



YATES

Commercial & Personal Insurance, Benefits, & Bonds

Job Description

Title: PL Associate Account Manager

Classification: Exempt

Department: Personal Lines

Reports To: VP of Personal Lines

Summary:

The AAM assists the Account Managers with tasks such as processing simple endorsements, cancellations, and monthly reporting. This role also helps with the renewal process of accounts by pulling loss runs, updating experience summaries, as well as running renewal updates.

Essential Functions:

Renewal Processing

- Help process renewals for accounts under a certain premium/commission amount
- Issue binders, evidences, and ID cards.
- Prepare summaries and marketing proposals.
- Process cancellations (not LPMT activity)
- Send Letters/Emails to Clients
- Monitor accounts for Payment

Endorsements

- Process simple endorsements including: Mortgagee changes, Address Changes, name changes, corrections, vehicle changes and marketing changes.
- Simple Endorsement Quotes - Deductible Changes, Defensive Driving Credits
- assist with front and back-end endorsement processing.

Other Duties:

- May perform other duties as assigned.
- Assist with Marketing (data entry into Epic and carriers).

Knowledge, Skills & Experience:

- Knowledge of Microsoft Word, Excel, Office, Applied Epic agency management system.
- 2+ years of Personal lines experience preferred.
- Excellent time management and organizational skills.

Education, Licensing and Additional Requirements:

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

Supervisory Responsibilities: N/A

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.