

## Commercial Lines Associate Account Executive Job Description

### Responsibilities

The Associate Account Executive is expected to contribute to the commercial lines department by assisting the Account Executives through customer service, account retention, general back office support, independent thinking and problem solving.

This includes:

- developing professional customer service skills
- developing communication, presentation and listening skills
- developing knowledge of the agency automation system and insurance rating systems
- developing insurance knowledge to progress towards an Account Executive position in the firm
- contacting clients to obtain information to keep accounts accurate
- assistant in the department's Cross-Selling and Account Rounding efforts
- assist in the underwriting/marketing of new and re-written business
- assist in the marketing/quoting of new business and additional coverage
- processing of new business policies, renewals and endorsements
- processing of change requests, certificates, cancellations/re-instatements, evidence of insurance requests, billing inquiries, LPR's, summaries of insurance, binders, recommendations from risk control and other 'customer service' type items
- assist in the handling of claims including reporting claims and following-up on claims progress
- handling the daily communications from the company underwriters
- assist with account & renewal reviews
- keeping abreast of the markets used by JP Inc.
- share knowledge and skills with the other members of the C/L's Department and other departments in the Office
- carry out projects assigned by the C/L's Manager

### Requirements

The Associate Account Executive is expected to have a working knowledge of the following:

- basic commercial insurance coverages and how they apply to a clients needs
- standard insurance forms and procedures
- basic concepts of rating commercial coverages
- automation and office professional procedures
- good communication skills

### Inside Position

This is an 'inside' position. The assistant account executive is not expected to attend client visits unless deemed necessary by the C/L's Account Executive or C/L's Manager.

### Education/Classes

The assistant account executive is expected to set a goal to obtain his/her NYS P&C License. The assistant account executive is also expected to attend various insurance and automation related education classes given by industry trade associations at the discretion of the C/L's Manager. The cost of these classes is covered by John Petschauer Inc. They are typically given at local venues during normal business hours.

- **This Job Description is to be used as a guideline. The responsibilities and requirements are not necessarily limited to the above lists and descriptions.**