

Lawley

INSURANCE | EMPLOYEE BENEFITS

Commercial Insurance Account Manager/Captives

These are the *fundamental* components of the job:

- Manage an established book of business assigned specifically to you which would include renewals, providing summaries, ordering and issuing binders, certificates, policies, proposals and other insurance documents within designated timelines
- Conduct consultative conversations with a Commercial client base; establish & maintain carrier and client relationships
- Facilitates the renewal process for existing group captive clients, ensuring timely and accurate communication of information needed to bind coverages, and documents agency records accordingly
- Assists with evaluation/qualification of prospects as potential group Captive candidates, and supports the quote/sales/documentation process for qualified candidates
- Performs various ad hoc reports/analyses related to the performance of group captives and/or captive clients.
- Prepare organized summaries and quotes for all markets within 2 days of completion of process
- Update applications based on coverages sold, issuing binders, and ordering policies within 24 hours
- Maintain complete and accurate documentation of all tasks in a computer system
- Obtaining non-marketed renewal quotes from existing carriers, completing renewal processes and handle non-renewal and cancellations for cause; prepare complete marketing submissions on existing clients as needed

Other *functions* of the job:

- Identify cross sell/up sell opportunities
- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- Property/Casualty License (all lines)
- Insurance experience in customer service or account management for 3 years or more
- Relevant knowledge of insurance products, documents and usages
- Proficient computers skills are a must! Word, Excel and Outlook. Demonstrated Excel & financial tracking acumen
- Incredible attention to detail and organizational skills; working quickly and efficiently
- Ability to work well independently and on a team

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- Methodical, yet swift decision-making skills especially in regard to prioritization
- Precise communication skills, even under time constraints
- Positive attitude while handling high volume/high visibility clients in a fast-paced environment
- A passion to make customers and coworkers feel important and value

A bit about Lawley!

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (nearly 70 years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1st day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$56,750 to \$101,280.

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