Kibble & Prentice

# Job Description for:
# Commercial Lines Assistant Account Manager

**REPORTING TO:**
Team Leader

**STATUS:**
Non-Exempt

**GENERAL DESCRIPTION:**
Assists Sales Executive and Account Manager in servicing and retaining of Commercial Accounts. Works to ensure that client retention goals are met by responding promptly to requests from Sales Executive and Account Manager.

**MAJOR RESPONSIBILITIES:**
- Process certificates at the direction of the Account Manager or Sales Executive
- Follow up with Carriers for receipt of endorsements
- Review and process endorsements, invoicing where necessary and updating the physical file with the changes made by the endorsement
- Processing some audits at the direction of the Account Manager
- Ordering Loss Runs
- Input initial applications in Applied
- Assist with spreadsheets and premium allocations on some accounts
- File set ups for both Agency and Client
- Initial Policy checks, including policy forms, policy term, policy number, premium, commission, etc.
- Copy Projects
- Maintains a courteous and effective relationship with clients, co-workers, carriers, and other business contacts
- Regularly shares knowledge and skills with others
- Other projects as needed by CAM or Sales Executive

**PROFESSIONAL DEVELOPMENTS:**
- Remains informed regarding industry information, new product information, legislation, coverage's, and technology
- Expected to further industry education through INS courses with intent to pursue an industry designation
- Expected to be a strong member of the community and further personal development in volunteer opportunities

**SUPERVISION EXERCISED:**
None

**QUALIFICATIONS:**
- Minimum of one-year Agency experience
- Washington State Property Casualty license
- Eager to learn new concepts and further professional development