ARBOR INSURANCE GROUP

JOB DESCRIPTION

Position: Personal Insurance Retention Advisor **Department: Personal Lines**

Primary functions:

1. Handle and process renewal personal lines policies and rewrites

Responsibilities:

1. Market existing business for cross sells and upsells, transferring cross sells to the Personal Insurance Producer.
2. Check renewal policies for accuracy in rating, key-entry, coverage and signatures, activity documents as Electronic documents. Ensure that these items are delivered via eSign, mail or face to face to the client.
3. When renewal premiums reflect a 15% or higher rate change, research savings alternatives. (deducible, rewrite, etc.)
4. On manually entered policies, update the client file with the current application into the agency management system.
5. Monitor renewal process by verifying all policies pulled up have been renewed, rewritten, etc.
6. Assemble application(s), photos, appraisals, etc. to be submitted to the insurance carriers for policy issuance.
7. Enter activity for any transaction or communication with carrier, client, or other.
8. Maintain a suspense system follow up on outstanding orders, correspondence, reports. Follow up on overdue and suspense items, keeping items up to date.
9. Handle carrier interfacing per agency standards, Uploading documents to carriers.
10. Handle daily mail, either found in your Outlook Inbox or USPS, by scanning, documenting activity, and acting upon requests.
11. Be familiar with and follow agency E&O guidelines.
12. Maintain electronic files in an orderly, up-to-date manner. Label all attachments per Personal Lines Process Manual.
13. Perform special projects at management's request.

Qualifications:

1. Must be a self-starter, imaginative and creative with good communications skills both verbal and written.
2. Must have thorough understanding of personal lines underwriting and PA Coverage.
3. Minimum two years' experience in a similar position is desirable. Must be licensed per state requirements.