



PERSONAL INSURANCE ADVISOR

Primary functions:

1. Handles existing client's processes, renewals and rewrites.
2. Provide in-house customer service to clients as requested.
3. Ask for Cross Sells and Up Sells.
4. Educates clients on coverage, technology and ease of doing business.

Responsibilities:

1. Market existing business for cross sells and up sells, transferring cross sells to the Personal Insurance Producer.
2. Input customer applications into the agency management system from the carrier rating applications on manually entered policies. (99% of policy are downloaded thru IVANS)
3. Assemble application(s), photos, appraisals, etc. to be submitted to the insurance carriers for policy issuance and Document in AMS360 Activity.
4. Check new and renewal policies for accuracy in rating, key-entry, coverage and signatures and activity as Electronic documents. Ensure that these items are delivered and/or mailed to client. If renewal comes in over 15% or higher, research savings alternatives. (Discounts, deductible, rewrite, etc.)
5. Monitor renewal process by verifying all policies pulled up in AMS have been renewed, rewritten, etc.
6. Receive phone calls from clients regarding insurance, claims, evidence of insurance, or policy issues and respond to requests.
7. Maintain and update client suspense system, follow up on outstanding orders, correspondence, reports, and items.
8. Handle carrier interfacing per agency standards.
9. Pick-up and service mail daily, by scanning, documenting to activity and reaching out to clients.
10. Update AMS for cancellations, reinstatements. Input past due notices, scan and activity.
11. Follow-up on photo requests, request for additional information, etc.
12. Handle routine correspondence between carriers, agency and insured.
13. Review Daily Company Download, updating the description for all policy changes, cancellations, etc.
14. New Claims, provide the client with an email or postcard with the adjuster claims contact information.
15. Be familiar with and follow agency E&O guidelines.
16. Maintain electronic files in an orderly, up-to-date manner. Label all attachments per Personal Lines Process Manual.
17. Perform special projects at management's request.

Qualifications:

1. Must be a self-starter, imaginative and creative with good communication skills both verbal and written. Should have thorough understating of personal lines underwriting and coverage.
2. Minimum two years' experience in similar position is desirable. Must be licensed per state requirements.
3. Must be have computer experience, AMS360 & Outlook a plus.
4. Accurate data entry.