



Commercial Lines Account Manager

Turbeville Insurance is currently looking for a Commercial Lines Account Manager. The Account Manager has the responsibility to provide prompt, accurate, courteous service to our customers, producers and company personnel. This position is intended to grow and develop your talents and insurance knowledge to the highest level possible.

Most importantly, the Account Manager is expected to provide service with a positive attitude, a high level of support in obtaining, maintaining, expanding, and servicing our commercial accounts.

Specific Job Duties Include:

- To service commercial lines accounts as assigned, aiding in rating and quoting when needed, and aiding in collections.
- To collect premiums per established agency procedures before binding any coverage.
- Screen, place and process Commercial Lines applications, as assigned.
- Review applications, renewal requests, and endorsements for compliance with underwriting authority and guidelines.
- Initiate, screen and prepare endorsement requests for Commercial Lines clients.
- Rate and compute endorsement, cancellation, additional or return premiums when required.
- Prepare and process bonds, endorsements, and cancellations when required.
- Prepare and process all requests for certificates of insurance as required within 24 hours of request.
- Handle telephone requests and correspondence in reference to assigned clients.
- Review all policies and endorsements for accuracy.
- Maintain all client activity in the agency automation system
- Invoice all Agency Bill premium bearing transactions.
- Keep current on rates, forms and coverage changes through circulars and bulletins, trade publications and seminars and schools offered.
- In cooperation with producer and marketing, prepare proposals of insurance for new commercial lines clients as needed, including visits to clients with producer when requested.
- Compute and prepare premium finance contracts as needed.
- Participate in seminars and classes for skill and knowledge development.
- Maintain required licenses.

- Maintain suspense items in a timely manner.
- Perform other duties as required.
- Following written procedures, process claims through the company and Applied System, advising producer immediately of claims.
- Type policies as required by company.
- Type and issue cancellation notices as required.
- **Service commercial lines accounts in an effort to prevent gap and/or lapse in coverage, thus reducing our E&O exposures.**
- Maintain accurate and updated suspense file.
- **Receive and process claim reports to company and suspense for handling of claim by company with appropriate follow-up.**
- Notify producer of any unpaid audits and request appropriate actions be made according to agency collections procedure.
- Be aware of past due accounts and contact insured as needed.
- Setup and prepare new account file per agency procedures.
- Order published rates and motor vehicle reports.
- Prioritize work load and/or request for assistance as required.
- Prepare account summaries as required.
- Prepare I.D. cards, evidence of property, certificates, binders, and/or obtain underwriter approval on manuscript endorsements.
- Prepare premium notes, questionnaires, and/or any vital documents required by the various companies.
- Assist other agency departments in securing and/or providing information necessary to issue appropriate policies in their department for which we have a mutual client.
- Assist and prepare formal proposals of insurance.
- Deliver policies, and related documents to insureds as needed.
- Meet with clients to discuss and handle their insurance needs.
- Prepare general correspondence as required for executive officers.
- Assist prospects/insureds until a producer is available.
- Refer life and health insurance leads to Life & Health Department
- Keep producers fully informed of all important activities on their accounts including being sensitive to potential problems and informing management.
- Assume other job responsibilities as assigned.
- Obtain expiration dates for policies not written by us to follow-up on and quote.
- Assist in cross selling and account rounding.
- Follow the guidelines outlined in this manual.
- Immediately report all malfunctions of *The Agency Manager* software to the Systems Manager

Education:

High School Diploma required
SC P&C Insurance License required
SC Broker License required
SC LAH License preferred
Two years experience in CL insurance in an agency environment preferred

Cover letter and resumes should be submitted to Elizabeth Harmon at elizabethh@tiasc.biz and Randy Fleniken at randyf@tiasc.biz

About Turbeville Insurance:

With over 25 years of experience, Turbeville Insurance Agency is a full-service Independent Insurance Agency with locations all over South Carolina. Recognized by the South Carolina's Chamber of Commerce as one of the top 100 Privately Owned Businesses in 2016 and 2017, Turbeville Insurance Agency specializes in finding customers the best coverage available in the ever-changing insurance marketplace. Whether it is commercial or personal insurance, Turbeville has dedicated and experienced staff available to meet all clients' needs. For more information visit www.turbevilleinsurance.com.