

**Position Title:** Personal Lines Account Manager  
**Reports To:** Department Team Leader  
**Location:** Salt Lake Office

**Classification:** Non-Exempt  
**Hours:** Full Time

### Position Summary

This is a position handles and processes new and renewal personal lines business and provides in-house customer service to clients and producers as assigned and requested.

### Essential Duties and Responsibilities:

- Market new business, determine premiums, prepare and present proposals to clients and maintain underwriting and marketing information by carrier
- Check new and renewal policies for accuracy in rating, typing, coverage's, signatures, and input these transactions to generate billing invoices. File taxes and work with producers on A/R reports
- Analyze and compare new business, renewals, expanding existing accounts by rounding out and cross-selling additional insurance products
- Receive phone calls from clients and companies regarding insurance, claims, or administrative problems, and comply with the request and/or refer to the producer only when necessary. Review coverage's with insured to ensure adequacy
- Maintain a suspense system to follow up on outstanding orders, correspondence, reports, and follow up on overdue and suspense items
- Be familiar with and follow agency E&O guidelines
- Maintain electronic and/or paper files in an orderly, up-to-date manner
- Consult, advise insured's on various lines of coverage to ensure clients are adequately insured
- Develop and maintain relationships with company underwriters
- Attend Pre-renewal meetings
- Performs other duties as assigned

### Qualifications:

#### Education and Experience:

- High School diploma or equivalent required
- Three to five years of Personal Lines Account Management experience

#### Licenses or Certifications:

- Active Utah Property and Casualty license required; Utah Life & Health license desired

#### Required Job Knowledge and Skills:

- Excellent communication skills, including listening, speaking and writing
- Must be actively pursuing CISR, CIC, CRM, ARM or CPCU
- Ability to establish and develop strong relationships with clients, carriers, trusted business partners and coworkers
- Good organizational and time management skills
- Ability to work well with details
- Proficient in a variety of computer software applications used by the agency, including MS Word, Excel, Outlook and PowerPoint; EPIC; as well as the Internet and Carrier Web Sites

### Physical:



## Job Description

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to communicate verbally and to listen for instructions and information. The employee is also required to sit for long periods of time often in front of a computer monitor and operate a computer keyboard. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required include close vision, distance vision, color vision, depth perception, and ability to adjust focus.