

INSURANCE ACCOUNT HANDLER REQUIRED

Reporting to the Operations Manager the main purpose of this job is assisting members of the Account Manager team in the prospecting of new insurance business and subsequent administration and development and renewal of both new and existing commercial insurance clients. The jobholder will also be expected to take an active role in business administration and renewal functions.

The jobholder will be required to obtain terms for individual cases on behalf of customers with insurers, primarily via the IT systems and generally under the direction and supervision of the appropriate Account Manager. The jobholder must demonstrate a good understanding of the principles of insurance, and how they relate to the individual needs of clients.

The jobholder must possess knowledge of the regulatory requirements pertaining to this role, including in particular, but not limited to, disclosure requirements, complaints processes, internal audit processes, record keeping requirements and general principles for conduct of business and FSA threshold conditions.

The jobholder will be responsible for contributing to the achievement of income targets for the business. (Income targets will be subject to regular review where changes in circumstances dictate).

MAIN RESPONSIBILITIES/DUTIES

The jobholder must be competent to complete the following tasks:

- Gather necessary information from new and existing clients to enable adequate presentation of risk to insurers for quotation purposes.
- Be able to operate, software systems employed by the firm in order to provide adequately detailed risk presentations and adequate and efficiently maintained record keeping for all aspects of client management.
- Maintenance of up to date administration and renewal processing in line with general office procedures , FSA directives and excellent customer service standards.
- Liaison with clients and insurers on an ongoing basis to ensure that high levels of customer service remain in force at all times.
- Liaison with clients where necessary to ensure that claims on policies are handled in an efficient and professional manner.
- Liaison with clients and insurers to ensure that premium collections and transmission to insurers are handled in an efficient and compliant manner and in compliance with the outlined practices of the firm in this respect.
- Focusing on both commercial and retail risk the jobholder will be required to have sufficient knowledge to assist the Account Managers in the handling of both of these classes of business.
- Ensure that administration tasks related to the role are completed in a timely and efficient manner.