

## ACCOUNT MANAGER REQUIRED

Reporting to the Managing Director the main purpose of this job is the prospecting of new commercial insurance business and subsequent development (via cross sell and client referral) of both new and existing insurance clients. Although primarily new business production focused, the jobholder will also be expected to take an active role in certain administration and renewal functions.

New business will be obtained from a variety of sources including, but not restricted to: leads generated via the firm's own in house marketing and telesales department, networking events and leads self-generated by efforts and initiatives introduced by the jobholder.

The jobholder will be required to obtain terms for individual cases on behalf of customers with insurers, primarily via the IT systems. The role demands the demonstration of detailed understanding of the principles of insurance and how they relate to the individual needs of clients. Good market knowledge, is essential as well as specific product knowledge.

The jobholder must possess a detailed knowledge of the regulatory requirements pertaining to this role, including in particular, but not limited to, disclosure requirements, rules relating to money handling, 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 achievement of a personal income target. (Income targets will be subject to regular review where changes in circumstances dictate).

The jobholder must be able to satisfactorily explain all aspects of the products sold to customers and must possess detailed knowledge of the practices and principles of insurance, evidenced by professional qualifications where appropriate.

## 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.
- Have detailed knowledge of, and ability 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.
- Analysis of terms and conditions of quotations received from product providers and then formulation of recommendations and presentation of these recommendations to customers.
- Liaison with clients and insurers on an ongoing basis to ensure that customer covers remain appropriate to their needs
- 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 a detailed knowledge of handling of both of these classes of business.
- Ensure that administration tasks related to the role are completed in a timely and efficient manner.