ROBERTSON RYAN
& ASSOCIATES
BUSINESS | PERSONAL | BENEFITS INSURANCE

CAREER OPPORTUNITY

Position: Personal Insurance Account Representative

Office: Various SE WI Options

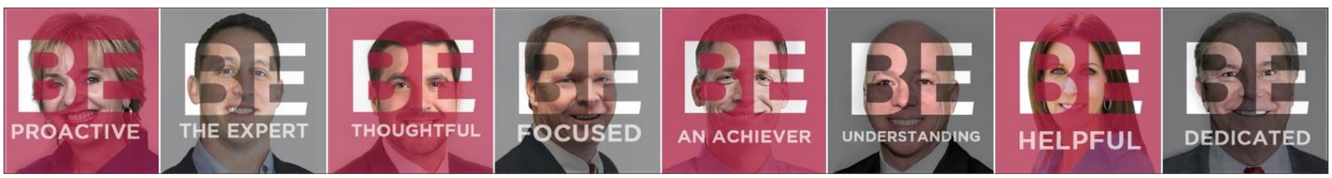
Status: Full-time

Career Level: Mid-Career to Senior-Career

Reports to: Personal Lines Manager **/** Vice President - Benefits & Personal Insurance

Salary: Based on Experience

Benefits: Profit Sharing, Community Involvement and Volunteer Opportunities, Full Benefits Package Including: Generous PTO/Holidays, Health Insurance, Dental Insurance, Life Insurance, Vision Insurance, 401K with a Friendly and Casual Work Environment



Assists in the production of new accounts and the retention of existing accounts. Provides prompt, efficient, high-quality service to designated accounts in support of Agent activities.

Major Responsibilities:

- Responsible for gathering information for referrals from existing accounts who contact you. Occasionally gathering information if the Agent is not available. Completing forms for quoting and recording results with appropriate activity codes
- Monitor the Expiration List 60 to 90 days for existing clients. Complete VIP Checklists for clients whose premium are $7,500 or more and are insured with high-net-worth carriers. Prepare Renewal Summaries for VIP accounts (accounts $7,500 or more). Review accounts that could be moved from non-standard companies. Enter follow-ups for non-downloading companies
- Monitor the Communication Log for accounts increasing in premium. Remarket if variance is not warranted by the market place or known factors (new vehicles, drivers, MVRS, etc.)

- Prepare applications (if required) and gather all documentation that is required by the company which includes but may not be limited to: alarm certificates, appraisals, report cards, photos, estimators, down payments
- Request quotes to be issued
- Check policies for accuracy and mail to the client
- Request/process endorsements. Verify all endorsements are processed correctly
- Notify Agent of cancellations
- Maintain a concern for timeliness and complete information when interacting with customers, agency and company personnel to minimize potential for errors & omissions claims
- Handle customer questions, counsel and advise clients with the claims reporting process
- Provide assistance in claims resolution, if necessary
- Document all material conversations with insureds and insurance companies regarding exposures and coverages
- Follow current procedures and workflows in Applied EPIC management system
- Maintain favorable relationships with clients, insurance companies, management, and other employees
- Cover for team members and other department employees in absences and vacations as directed by management
- Performs other functions as assigned by management

Knowledge, Skills and Abilities:

- Prefer Property & Casualty License, or willing to obtain
- Ideally 3-5+ years insurance experience
- Prefer background with an Independent Agency
- Above average computer skills and experience in Microsoft Word
- Ability to multi-task in a fast paced, customer focused office
- Expert attention to detail
- Independent thinker and self-motivated

- A courteous and professional demeanor with good interpersonal skills
- Highly professional and possesses strong verbal and written skills

Join a top 100 US Insurance agency.

Founded in 1960, Robertson Ryan & Associates, Inc. offers a broad range of solutions for Business, Benefits and Personal Insurance. We counsel and assist more than 30,000 clients from small businesses to national accounts in all industries. With over 230 employees and 130+ insurance companies we are the largest independent agency in WI and 54th largest privately held agency in the nation. Robertson Ryan is unique in that each agent is a Producer Owner making client service and satisfaction a top priority. Our culture is dynamic, fun and most employees have worked at RRA well over a decade.

Apply at www.robertsonryan.com/careers